BusinessObjects Enterprise InfoView User's Guide

BusinessObjects Enterprise XI 3.1

2009-05-25

Contents

Welcome to BusinessObjects Enterprise

chapter 1

About this documentation

This help provides you with information and procedures for using BusinessObjects Enterprise and InfoView.

InfoView runs within your web browser and is your main interface for working with objects in BusinessObjects Enterprise. Your BusinessObjects Enterprise administrator may deploy different types of objects, such as Crystal reports, Voyager workspaces, Web Intelligence documents, Desktop Intelligence documents, and other objects that are created from BusinessObjects Enterprise plug-in components. InfoView allows you to view these objects, organize them, and work with them to suit your needs.

Note:
Because the appearance and functionality of InfoView can be customized, your desktop may be different from the one that is described in this help. However, you can still apply many of the procedures that are described in the sections that follow.

Who should use this documentation?

This help is intended for users who work with objects over the web through BusinessObjects Enterprise and InfoView.

For more information about the product, consult the *BusinessObjects Enterprise Administrator's Guide*, the *BusinessObjects Enterprise Getting Started Guide*, and the *BusinessObjects Enterprise Installation Guide*. Online versions of these guides are included in the `docs` directory of your product distribution.

Getting Started

2

chapter

Overview

BusinessObjects Enterprise comes with InfoView, a web desktop that acts as a window to a range of useful business information about your company. From InfoView, you can access Crystal reports, Voyager workspaces, Web Intelligence documents, Desktop Intelligence documents, and other objects, and organize them to suit your preferences.

The features that are available in InfoView vary by content type, but in general, you can view information in your web browser, export it to other business applications (such as Microsoft Excel), and save it to a specified location. BusinessObjects Enterprise also provides access to a range of analytic tools to help you explore information in more detail.

The following additional features are available with InfoView:

- Discussions

  This feature enables you to create and share notes about reports, documents, and other objects in InfoView.

- Encyclopedia

  This feature provides you with key information about reports and documents to facilitate the analysis of business intelligence.

- Publisher

  This feature lets you deliver information in a customized format by providing a secure environment to share information in a personalized way. For more information, see the *BusinessObjects Enterprise Publisher's Guide*.

The following additional features are available with InfoView when you have the appropriate license(s):

- Voyager

  This feature allows you to create customized Voyager workspaces based on multi-dimensional data sources.

- Process Tracker

  This feature enables you to map, track, and communicate business processes through a set of activities, associated reports, and analytics.

For more information, see the *Process Tracker Installation and User's Guide*.

For information about the availability of these features in your deployment, contact your BusinessObjects Enterprise administrator.

Related Topics

- *Using Discussions* on page 113
- *Using Encyclopedia* on page 119
- *Working with Voyager Workspaces* on page 159
- *Working with Publishing* on page 215

What's new in BusinessObjects Enterprise XI 3.1?

This version of BusinessObjects Enterprise introduces many new features and enhancements.

Enhanced user interface

Enhanced user interface: InfoView's user interface has been revamped so that it is easier to use and more intuitive. New user interface features include:

- The new InfoView home page, from which you can directly access areas of InfoView such as your inbox, the "Document List", your "Favorites", and your "Preferences".
- You can access the list of all folders, categories, and objects in BusinessObjects Enterprise from any location in InfoView by clicking on the **Document List** button.
- Double-click the title of an object to access default actions while browsing in BusinessObjects Enterprise. For example, to open a Crystal report while navigating through folders, double-click the title of the report.
- Click the title of an object to select it while browsing in BusinessObjects Enterprise.
- Right-click the title of an object to access all of the actions that you can perform on the object while browsing in BusinessObjects Enterprise.
- Menus in InfoView are now context aware: only actions that you can perform on the object(s) that you are currently interacting with are available for you to choose.

Publishing

This version of BusinessObjects Enterprise features many enhancements to the Publishing feature, including support for Crystal reports and Web Intelligence documents, new processing capabilities, the ability to publish to multiple formats and destinations and enhanced PDF, support for customized processing extensions, dynamic recipients, and delivery rules. Fore more information about Publishing, see the *Overview* on page 216 of the “Working with Publishing” chapter.

Content Search

This version of BusinessObjects Enterprise includes Content Search, an optimized search tool that enables you to search within the content of objects managed by BusinessObjects Enterprise. These objects include Crystal reports, Web Intelligence and Desktop Intelligence documents, as well as Microsoft Word and Excel documents. Content Search also allows you to take advantage of features such as search result grouping, matched word highlighting, suggested searches, and multilingual searching, and search techniques. For more information, see *Content Search* on page 59.

Online documentation library

A completely new interface to the full documentation set now has guides for all Business Objects products. The new online documentation library has the most up-to-date version of the Business Objects product documentation, posted upon publication and updated regularly. You can browse the library contents, run full-text searches, read guides on line, and download PDFs.

http://support.businessobjects.com/documentation/product_guides/default.asp

Logging on to InfoView

To use InfoView, one of the following web browsers must be installed on your machine:

- Microsoft Internet Explorer
- Firefox
- Safari (for Macintosh users)

For more information on the platforms that BusinessObjects Enterprise supports, please see the *Products Availability Report* (PAR) at *http://support.businessobjects.com/documentation/supported_platforms/default.asp*.

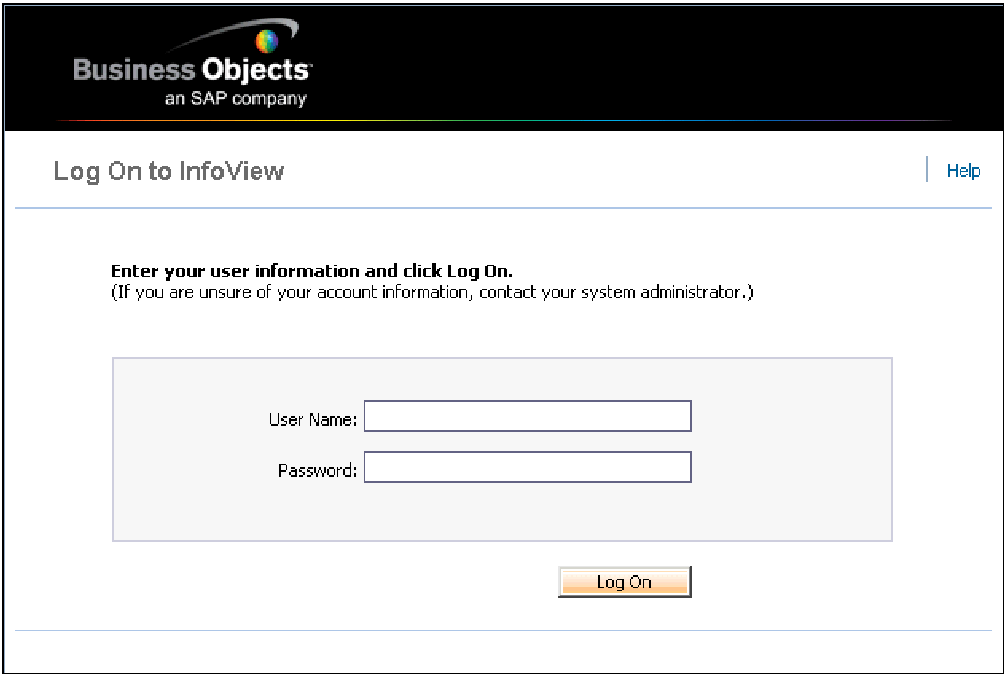
To log on to InfoView

1. Open your web browser.
2. Enter the appropriateURL for InfoView:
   - For Java InfoView go to http://`webserver`:`portnumber`/InfoViewApp/
   - For .NET InfoView go to http://`webserver`/InfoViewApp/

   Replace `webserver` with the name of the web server and `portnumber` with the port number that is set up for BusinessObjects Enterprise. You may need to ask your administrator for the name of the web server, the port number, or the exact URL to enter.

   Tip:
   If you have any BusinessObjects Enterprise client tools installed on Windows, you can also click **Start** > **Programs** > **BusinessObjects XI 3.1** > **BusinessObjects Enterprise** > **BusinessObjects Enterprise Java InfoView** or **BusinessObjects Enterprise .NET InfoView**.

   The "Log On to InfoView" page appears.



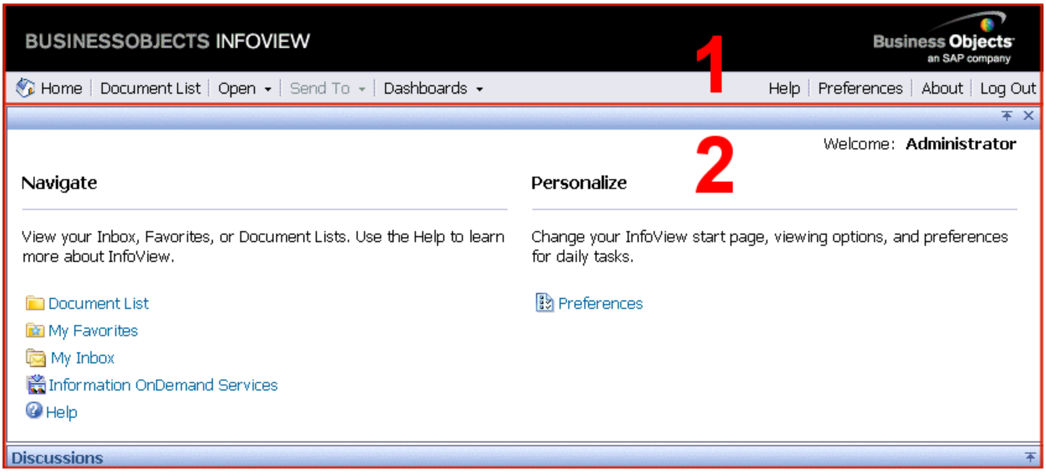
3. By default, you will not be asked to supply a system name. However, if you are asked to supply one, enter the name of your Central Management Server (CMS) In the **System** field.
4. In the **User name** and **Password** fields, enter your logon credentials.
5. By default, you will not be asked to choose an authentication type. However, if you are asked to supply one, select **Enterprise**, **LDAP**, **Windows AD**, or **Windows NT** from the **Authentication** list.
   - Enterprise authentication requires a user name and password that are recognized by BusinessObjects Enterprise.
   - LDAP authentication requires a user name and password that are recognized by an LDAP directory server.
   - Windows AD authentication requires a user name and password that are recognized by Windows AD.
   - Windows NT authentication requires a user name and password that are recognized by Windows NT.

   Enterprise authentication is the default authentication method. LDAP, Windows AD, Windows NT, and other third-party authentication types require special setup. For more information, see the *BusinessObjects Enterprise Administrator's Guide*.
6. Click **Log On**.

   The" InfoView home page" appears.

InfoView

If you successfully log on, InfoView appears in your web browser.



You can change your initial view in your preferences.

The folders and objects that you can see in the **Document List**, the rights that you have to schedule, the viewer that you see, and so on, depend on the account you log on to, the rights granted to you by your BusinessObjects Enterprise administrator, and the settings that both you and your administrator enable.

InfoView is divided into two panels. For information about each panel, see the following sections:

1. Header panel
2. Workspace panel

Note:
Do not use the back button of your web browser to navigate within InfoView or any portion of BusinessObjects Enterprise.

Related Topics

- *General preferences* on page 30
- *Header panel* on page 22
- *Workspace panel* on page 22

Header panel

The Header panel displays the logo and the user name of the account that you used to log on to InfoView. It contains the InfoView toolbar that you can use to perform the following actions:

Option	Description
 **Home**	Displays the InfoView home page.
Document List	Shows the **Document List**.
Open	Opens components of InfoView such as the "Encyclopedia".
Send To	Sends an object or instance to a destination.
Dashboards	Allows you to access dashboards and analytics.
Log Out	Logs the user out.
Preferences	Allows you to set how information is displayed.
About	Displays product and sales information about InfoView.
Help	Displays the online help for InfoView.

Related Topics

- *Document List* on page 23

Workspace panel

The Workspace panel displays InfoView content. This is where you can view, schedule, and modify objects, set your InfoView preferences, browse the **Document List**, and so on. The toolbars and other features of the Workspace panel change according to your current task.

Document List

The **Document List** displays the files, folders, and categories in InfoView.

Related Topics

- *Tree panel* on page 24
- *Details panel* on page 24

InfoView Workspace toolbar

The InfoView Workspace toolbar is displayed when viewing the **Document List**. It allows you to perform the following actions on objects, categories, and folders in the **Document List**.

Option	Description
 **Switch to Folders**	Shows folders in the Tree panel.
 **Switch to Categories**	Shows categories in the Tree panel.
 **Refresh**	Refreshes the view of the **Document List**.
New	Allows you to create new objects within InfoView.
Add	Allows you to add existing objects to InfoView.

Option	Description
Organize	Allows you to organize the selected object.
Actions	Allows you to perform actions on the selected object.
Search	Allows you to search for objects.
	Allows you to navigate between pages in the **Document List**.

Tree panel

The Tree panel is visible when you view the **Document List**. It displays the folders and categories in BusinessObjects Enterprise in a hierarchical structure, allowing you to navigate through them. When you select a folder or category in the "Tree" panel, its contents appear in the Details panel .

Note:
Object packages also appear in the "Tree" panel and behave like folders. Selecting an object package causes its contents to appear in the Details panel.

Details panel

The Details panel is visible when you view the **Document List**. It displays the contents of folders, categories, and objects packages in BusinessObjects Enterprise. You can filter and sort the objects displayed in the Details panel, and choose to modify, view, organize, or schedule them if you have the necessary rights.

Recommended reading

Depending on how you use BusinessObjects Enterprise and InfoView, you may want to focus on specific sections of this document.

Viewing objects

If you use BusinessObjects Enterprise to view objects such as reports, you do not need to read about the advanced features of InfoView. It is recommended that you read only the following sections:

- *Getting Started* on page 15
- *Setting Preferences* on page 29
- *Working with Objects* on page 51

Publishing and managing objects

For advanced users who publish and organize objects for other users to view, it is recommended that you read the following sections:

- *Getting Started* on page 15
- *Setting Preferences* on page 29
- *Working with Objects* on page 51
- *My InfoView* on page 109
- *Using Discussions* on page 113
- *Using Encyclopedia* on page 119

Depending on the types of objects that you create and/or publish, you may also want to review the following sections:

- *Working with Crystal Reports* on page 137
- *Working with Voyager Workspaces* on page 159
- *Working with Web Intelligence Documents* on page 149
- *Working with Desktop Intelligence documents* on page 201

Note:

- If you will also be publishing objects to BusinessObjects Enterprise, you should refer to the *BusinessObjects Publisher User's Guide*.
- If you work with Web Intelligence documents, also refer to *Building Reports with the Web Intelligence Report Panel*, which appears when you click help while you view a Web Intelligence document.

Crystal Reports Server recommended reading

This section outlines the topics in the *BusinessObjects Enterprise InfoView User's Guide* that will be of most use to you if you are using Crystal Reports Server.

How to access InfoView

For information about accessing InfoView, go to the following sections:

- *Logging on to InfoView* on page 18
- *InfoView* on page 20

How to view files

For information about viewing files inside InfoView go to the following sections:

- *Viewing objects* on page 54
- *Opening objects for viewing* on page 54
- *Changing viewers* on page 55

How to schedule files

For information about scheduling files inside InfoView go to the following sections:

- *Scheduling objects* on page 69
- *Setting the instance title* on page 71
- *Choose a recurrence pattern* on page 71
- *Enabling notification* on page 73
- *Specifying database logon information* on page 74
- *Applying record selection formulas* on page 91
- *Available formats* on page 75
- *Destination locations* on page 85
- *Printing an instance* on page 92
- *Scheduling with events* on page 93
- *Choosing a server to run a scheduling job* on page 94
- *Parameters* on page 141
- *Pausing or resuming an instance* on page 96
- *Viewing instances of objects* on page 99
- *Deleting an instance* on page 101

How to organize files

For information about organizing your content in InfoView go to the following sections:

- *Organizing objects* on page 66
- *Creating folders or categories* on page 66
- *Adding objects to a folder* on page 68
- *Assigning objects to a category* on page 68
- *Sorting objects* on page 69
- *Copying objects* on page 104
- *Creating shortcuts* on page 106
- *Moving objects* on page 104

- *Deleting objects* on page 105

How to use Discussions

For information about how to use Discussions go to *Using Discussions* on page 113.

Setting Preferences

chapter 3

Overview

Preferences determine how you log on to InfoView and what view is displayed when you do. They also determine specific settings for the various objects that you view, such as viewers for Crystal reports and view formats for Web Intelligence and Desktop Intelligence documents.

Note:
As a best practice, you should set your preferences before you begin to work with objects in InfoView. However, depending on your deployment, your BusinessObjects Enterprise administrator may configure your system to use predetermined settings by default.

Related Topics

- *Web Intelligence preferences* on page 32
- *Desktop Intelligence preferences* on page 40
- *Crystal Reports preferences* on page 41
- *Dashboard and analytics preferences* on page 47

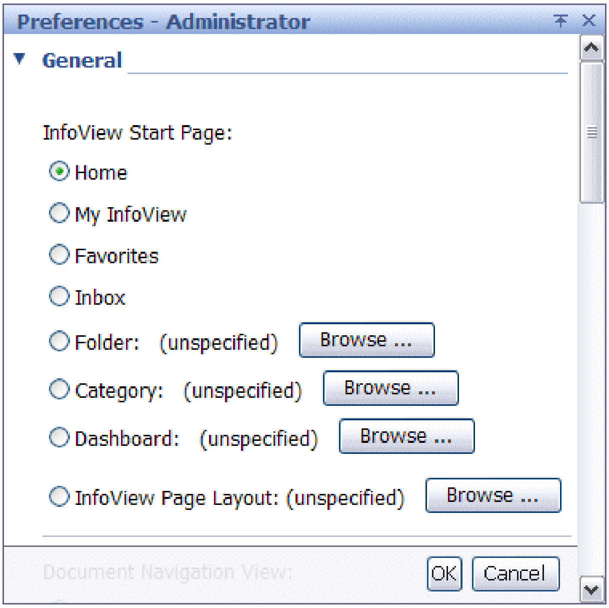
General preferences

This section describes how to set your general viewing preferences for InfoView.

To set general preferences

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

   The "Preferences" page appears.



3. In the "InfoView Start Page" area, select the option that you want to set as your initial view.

   For example, if you choose Favorites, then the Favorites folder is automatically selected in the Document List the next time you log on.

   Tip:
   You can also customize an InfoView page layout to be your start page, or use a dashboard. For details, see *Using My InfoView* on page 110 and *Overview* on page 212.

4. In the "Document Navigation View" area, select **Folder** or **Category**.

   The option that you choose determines whether the Tree panel displays the objects in InfoView by the folders in which they are located or the categories to which they are assigned.

5. In the "Set the number of objects (max.) per page" area, specify the maximum number of objects that you want to see displayed per page when you view lists of objects.
6. In the "Document List Display" area, select the summary information that you want to see in the Details panel for each object:
   - Description

- Owner
- Date
- Instance Count

7. In the "Document Viewing" area, select how you want to view your documents.
8. In the "Product Locale" area, select your current language.

   This setting determines the language set that is used by InfoView.

9. In the "Current Time Zone" area, select the appropriate time zone.

   Note:
   It is important that you check this setting before you schedule any objects to run. The default time zone is local to the web server that is running BusinessObjects Enterprise, not the Central Management Server (CMS) machine(s) to which each user connects. By properly setting your time zone, you ensure that your scheduled objects are processed in accordance with the time zone in which you are working.

10. In the "Preferred Viewing Locale" area, select the locale that uses the formatting conventions for dates, numbers, and time that you would like to use while viewing objects.
11. Click **OK**.

Web Intelligence preferences

Before you access Web Intelligence documents through InfoView, it is recommended that you set the Web Intelligence preferences to suit your query and reporting needs.

Note:
The functionality described in this section is available through InfoView if you have appropriate Web Intelligence licenses. For information about licensing, contact your sales representative.

Selecting Web Intelligence viewing preferences

You can choose a different view format and formatting locale to correspond with how you interact with information in Web Intelligence documents through InfoView.

To select a view format for Web Intelligence documents

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

   The "Preferences" page appears.
3. Click the **Web Intelligence** section.
4. In the "Select a default view format" area, select the format that you want to use when you view your Web Intelligence documents:
   - Choose **Web** if you want to be able to view and print documents, respond to prompts, and/or perform drill analysis. You can also track data changes in the Web viewer if you have the necessary rights.
   - Choose **Interactive** if you want to be able to view and print documents, apply filters to the documents, do sorts and calculations, modify the format of the data in tables and charts, respond to prompts, and/or perform drill analysis.

     Note:

     - This option is available only if you have Web Intelligence deployed in JSP mode.
     - To be able to use Query-HTML (the Interactive editing tool) to create documents and/or edit queries, it is recommended that you select this option. If you do not select the Interactive view format, you can still use the Query-HTML to define your documents, but you will not be able to format them.
   - Choose **PDF (Adobe Acrobat Reader required)** if you want to be able to respond to prompts, view and print documents directly in PDF format. Depending on how your BusinessObjects Enterprise administrator configures your system, you may view a PDF of the entire document, or of the default tab. If you view a PDF of the default

tab, you can create PDFs of the other tabs of the report by clicking the links at the bottom of your screen.

5. Click **OK**.

To select a formatting locale for Web Intelligence documents

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

   The "Preferences" page appears.
3. Click the **Web Intelligence** section.
4. In the "When viewing a document" area, select the locale you would like to use. The format in which numbers, times, and dates are displayed in the locale you choose will be used to display numbers, times, and dates in the Web Intelligence documents:
   - Choose **Use the document locale to format the data** to maintain the locale used to format the data when the document was created.
   - Choose **Use my Preferred Viewing Locale** to format the data with the locale you have listed under General Preferences as your Preferred Viewing Locale.
5. Click **OK**.

Selecting a creation/editing tool

The creation/editing tools enable you to create and/or edit Web Intelligence documents. Depending on how your system is configured or how you want to interact with Web Intelligence documents, a specific report panel format may be more suited to your needs.

To select a default creation/editing tool

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

   The "Preferences" page appears.

3. Click the **Web Intelligence** section.
4. In the "Select a default creation/editing tool" area, select the tool that you want to use when you create or edit Web Intelligence documents:

   Note that the following options are available only if your administrator has deployed Web Intelligence in JSP mode.

   - If you want to use a graphical editor to build formulas, then choose **Advanced**.

     The Advanced editing tool, called the Java Report Panel, allows you to define the content of documents from multiple data sources and create and or modify the queries on which new or existing documents are based. You can also create subqueries, combined queries, and rank data.

     Note:
     You must use a browser that supports the Java Virtual Machine and install a Java applet to use the Interactive editing tool.

   - If you want to work with queries in an HTML environment, then choose **Interactive**.

     The Interactive editing tool, called Query-HTML, allows you to define the content of documents from multiple data sources. You can use the Interactive editing tool to create new documents or modify the queries on which existing Web Intelligence documents are based.

   - If you want to open Web Intelligence Offline and edit or create your Web Intelligence documents there, choose desktop.

     Note:
     Web Intelligence Offline must be installed on your computer to use this option.

   - If you want to use a wizard-like interface to build your documents, then choose **Web Accessibility**.

     The Web Accessibility editing tool, called the HTML Report Panel, allows you to build query and report features through a simple interface. Each document that you create is based on a single data source and can contain multiple reports that display different subsets of information. The Web Accessibility tool can be customized for special deployments.

5. Click **OK**.

Selecting a default universe

You can specify a universe to be used as the default data source for your Web Intelligence documents.

To select a universe

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

   The "Preferences" page appears.
3. Click the **Web Intelligence** section.
4. In the "Select a default Universe" area, click **Browse**, and choose one of the following options:
   - If you want to select a default universe for Web Intelligence to use when you create documents, then select a universe from the list.
   - If you do not want to set a default universe, then choose **No default universe**.
5. Click **OK**.

Selecting your drill options

Before you begin a drill session, you must specify how your Web Intelligence documents change when you perform a drill. When you drill, you make your view of data more or less detailed. For example, you can drill-down on data grouped by country to view it grouped by region, or drill-up data grouped by city to view it grouped by country.

To set your drill options

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

The "Preferences" page appears.

3. Click the **Web Intelligence Preferences** section.
4. In the "Select a view format" area, ensure that either **Web** or **Interactive** is selected.
5. In the "Drill options" area, select the general options that you want to apply to your drill sessions:
   - If you want Web Intelligence to prompt you whenever a drill action requires a new query to add more data to the document, then select **Prompt when drill requires additional data**.

     For example, when you drill the results that are displayed on a Web Intelligence document, you may want to drill to higher or lower-level information that is not included in the scope of analysis for the document. In this situation, Web Intelligence needs to run a new query to retrieve additional data from the data source. You can choose to be prompted with a message whenever a new query is needed.

     The prompt message asks you to decide whether or not you want to run the additional query. In addition, the prompt may allow you to apply filters to the extra dimensions that you include in the new query. As a result, you can restrict the size of the query to just the data that is necessary for your analysis. Note, however, that you need permission from your administrator to drill out of the scope of analysis during a drill session.

   - If you want Web Intelligence to synchronize drilling on all report blocks, then select **Synchronize drill on report blocks**.

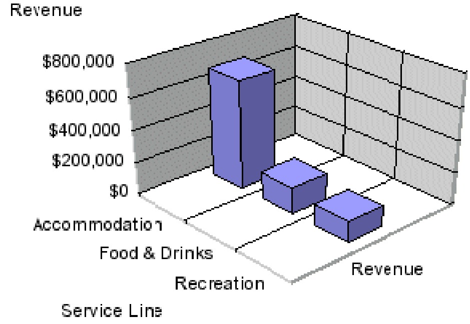
     Each table, chart, or free-standing cell in a report represents a specific block of data. There are two ways to drill on a report with multiple report blocks:

     - Synchronize drill on report blocks.
     - Drill on only the selected block.

     The following examples show how each option affects a report as you drill down on a table to analyze detailed results per service line.

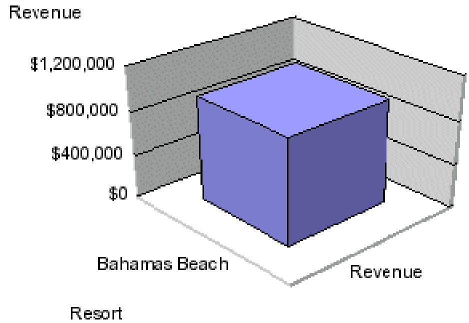
     In the first example, **Synchronize drill on report blocks** is selected, so both the table and the chart display the drilled values:

Service Line	Revenue
Accommodation	$673,664.00
Food & Drinks	$169,680.00
Recreation	$128,100.00



In the second example, Synchronize drill on report blocks is not selected. The drill is only performed on the selected block, and only the table displays the drilled values:

Service Line	Revenue
Accommodation	$673,664.00
Food & Drinks	$169,680.00
Recreation	$128,100.00



- If you want Web Intelligence to hide the Drill toolbar when you switch to drill mode, then select **Hide drill toolbar**.

  When you start drill mode, the Drill toolbar automatically appears at the top of the drilled report. The toolbar displays the value(s) on which you drilled. These values filter the results that are displayed on the drilled report.

  For example, if you drill on year 2001, the results that are displayed on the drilled table are the Q1, Q2, Q3, and Q4 for year 2001. This means that the quarterly values to which you drilled to are filtered by

2001. The Drill toolbar displays “2001”, the value that filters the drilled results.

The Drill toolbar allows you to select other values to filter the results differently. For example, if you use the Drill toolbar to select “2002”, then the results that are displayed on the drilled table will be Q1, Q2, Q3, and Q4 for year 2002.

If the drilled report includes dimensions from multiple queries, a tooltip appears when you rest your cursor on the value that is displayed on the filter. The tooltip displays the name of the query and the dimension for the value.

You can choose to hide the Drill toolbar when you start drill mode. This is useful if you do not want to select filters during your drill session.

6. In the "Start drill session" area, select the option that you want to apply to your drill sessions:
   - If you want to retain a copy of the original document so that you can compare the drilled results to the data in the original document, then choose **On duplicate report**.

     Web Intelligence creates a duplicate of the original report. When you end drill mode, both the original report and the drilled report remain in the document for you to view.
   - If you want to drill on the report so that the report is modified by your drill actions, then choose **On existing report**.

     When you end drill mode, the report displays the drilled values.
7. Click **OK**.

Selecting an MS Excel format

This option determines the appearance of the data in instances of Web Intelligence documents if you schedule or export the documents to MS Excel format.

To select an MS Excel format

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

   The "Preferences" page appears.

3. Click the **Web Intelligence** tab.
4. In the "Select the priority option for saving a MS Excel" area, select the option that best fits your needs:
   - If you want to display the data in a format that is similar to working in Web Intelligence, then choose **Prioritize the formatting of the documents**.
   - If you want to display the data in a text format, then choose **Prioritize easy data processing in Excel**.
5. Click **OK**.

Desktop Intelligence preferences

Before you view Desktop Intelligence documents in InfoView, it is recommended that you set the Desktop Intelligence preferences to suit your viewing needs.

To set Desktop Intelligence viewing preferences

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

   The "Preferences" page appears.

3. Click **Desktop Intelligence**.
4. In the "Select a default view format" area, select the format in which you would like to view Desktop Intelligence documents:
   - **Web**

Using the web view format displays Desktop Intelligence documents in a web-based viewer in HTML format, from which you can do some on-report analysis.

- **PDF**

  Using the PDF view format displays Desktop Intelligence documents in PDF format. You can then print the document or save the PDF version. Depending on how your BusinessObjects Enterprise administrator configures your system, you may view a PDF of the entire document, or of the default tab. If you view a PDF of the default tab, you can create PDFs of the other tabs of the report by clicking the links at the bottom of your screen.

- **Desktop Intelligence format (Windows Only)**

  Using the Desktop Intelligence view format displays documents in the Desktop Intelligence client. You must have the Desktop Intelligence client installed on your computer to use this option

5. Click **OK**.

Crystal Reports preferences

Before you work with Crystal reports in InfoView, it is recommended that you set the Crystal Reports preferences to suit your reporting needs.

Selecting your Crystal report viewer

To select a Crystal report viewer

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

   The "Preferences" page appears.

3. Click the **Crystal Reports Preferences** section.
4. In the "Select a default view format" area, select the viewer that you want to use when you view your Crystal reports:
   - **Web**

The Web viewer does not require any downloading, and will work without Java or ActiveX. For more information, see *Web viewer* on page 43.

- **Web ActiveX**

  The ActiveX viewer is enabled if you use a version of Microsoft Internet Explorer that supports ActiveX controls. For more information, see *Web ActiveX viewer* on page 44.

- **Web Java**

  The Java viewer is designed for web browsers that support the Java Virtual Machine. For more information, see *Web Java viewer* on page 46.

5. If you select the Web viewer, in the "Select printing control" area, choose **PDF** or **ActiveX one click printing**.

   If you choose PDF the viewer exports the report to PDF format when you click **Print**. You can then print the PDF.

   Note:
   If you have Flash objects in your report that you want to appear when you print, you must print to a PDF.

   If you choose ActiveX one click printing, you can print the report directly from the Crystal report viewer.

   Note:
   The ActiveX option requires the installation of a small ActiveX component.

6. If you selected the Web viewer, you must choose the resolution that you want to use in the "Select a rendering resolution" area.
7. In the "Select a default measuring unit" is area, select **inches** or **millimeters**.
8. Click **OK**.

Description of the Crystal report viewers

The Crystal report viewers allow you to view reports, navigate through multiple pages, refresh data, drill down to see details behind charts and summarized data, select parameters, and so on. They also have powerful printing and exporting capabilities.

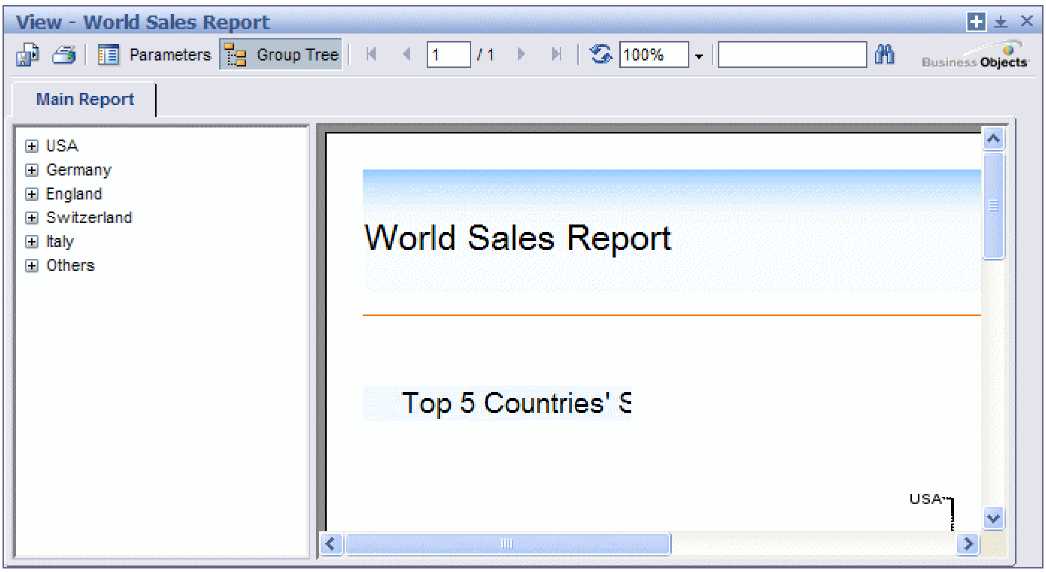
The online Crystal report viewers support ActiveX, Java, and a no-downloading web alternative. Typically, your BusinessObjects Enterprise administrator selects the viewer type that is best suited to your company's needs. However, you can also manually select your preferred viewer type through the Crystal Reports preferences page. (For more information, see *Crystal Reports preferences* on page 41.)

You can also view your reports when you are not connected to BusinessObjects Enterprise. For more information, see the *Crystal Reports Viewer* on page 146.

Note:
Some features of the Crystal report viewers may be disabled by your BusinessObjects Enterprise administrator. Contact your administrator for more information.

Web viewer

The Web viewer can be accessed using your browser without downloading a plugin. You can view, refresh, and print your reports, edit parameters, and export reports to a variety of formats.



In addition to the functions that are provided on the browser's standard toolbar, the Web viewer has extra functions on its custom toolbar:

- Export report
- Print report
- Show/Hide Parameter Panel
- Show/Hide group tree
- Go to first page
- Go to previous page
- Go to page
- Go to next page
- Go to last page
- Refresh page
- Zoom
- Search for text

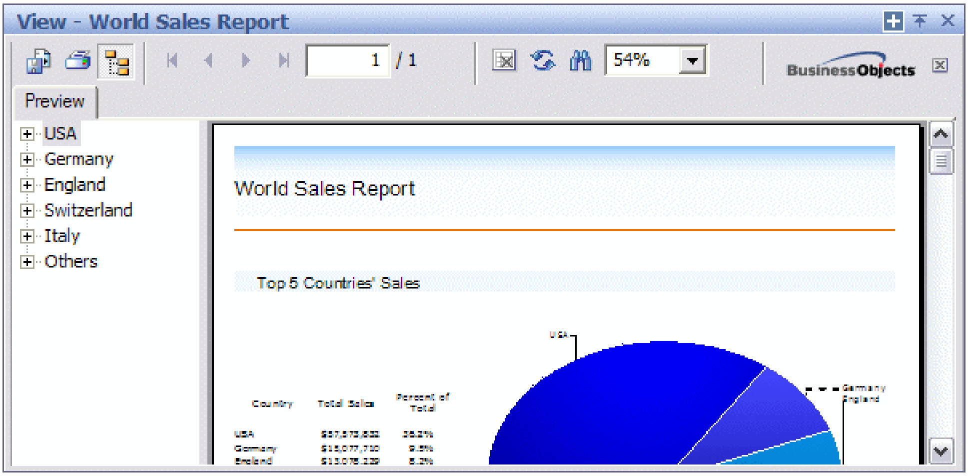
Note:
The Web viewer is the only Crystal reports viewer that allows you to access the Parameter Panel.

Related Topics

- *Viewing Crystal reports* on page 138

Web ActiveX viewer

The Web ActiveX viewer can be used with Microsoft Internet Explorer versions that support ActiveX controls. It requires you to download and install an ActiveX component. You can view, refresh, and print your reports and export them to a variety of formats.



In addition to the functions that are provided on the browser's standard toolbar, the Web ActiveX viewer has extra functions on its custom toolbar:

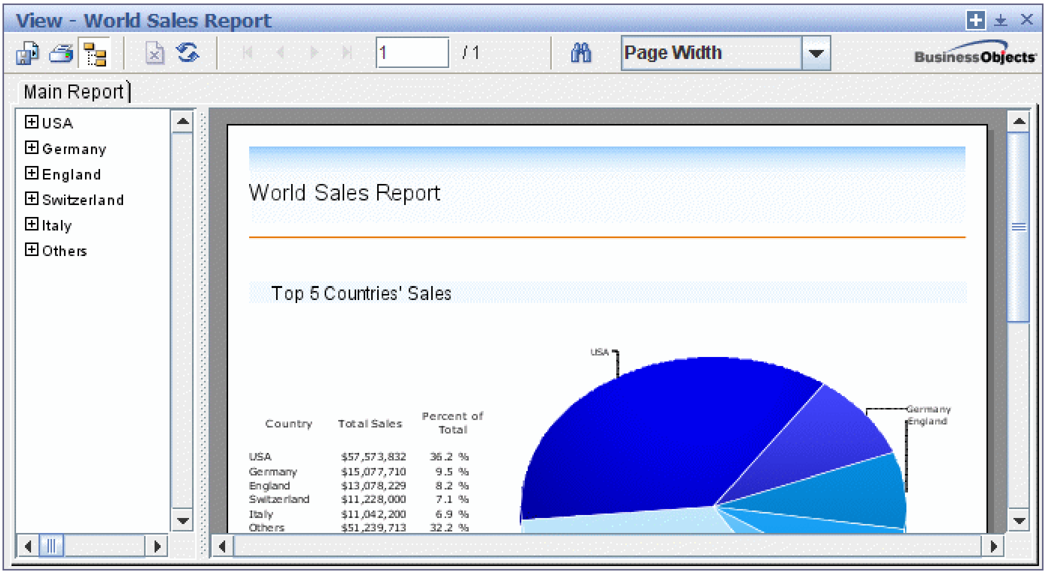
- Export report
- Print report
- Toggle group tree
- Go to first page
- Go to previous page
- Go to next page
- Go to last page
- Go to page
- Stop loading
- Refresh
- Search text
- Zoom
- Close current view

Related Topics

- *Viewing Crystal reports* on page 138

Web Java viewer

The Web Java viewer can be accessed by using a web browser that supports the Java Virtual Machine. You can view, refresh, and print your reports and export them to a variety of formats.



In addition to the functions that are provided on the browser's standard toolbar, the Web Java viewer has extra functions on its custom toolbar:

- Export report
- Print report
- Show/Hide group tree
- Stop
- Refresh data
- Go to first page
- Go to previous page
- Go to next page

- Go to last page
- Current and last page numbers
- Search for text
- Magnification factor

When you place the mouse pointer over a button on the custom toolbar, the associated description appears in the bottom left-hand side of the browser's status bar.

Note:
You may experience minor problems when you scroll through reports in the Java viewer. These problems are the result of the implementation of the Java Virtual Machine in certain web browsers. If you experience such problems, click repeatedly on the scroll buttons to scroll. Do not hold the scroll buttons down.

Related Topics

- *Viewing Crystal reports* on page 138

Dashboard and analytics preferences

Before you work with dashboards and analytics or Dashboard Builder in InfoView, it is recommended that you set the Dashboard and Analytics preferences to suit your needs.

To set dashboards and analytics preferences

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.

   The "Preferences" page appears.
3. Click the **Dashboards and Analytics** section.
4. In the "Select a default style to use when creating a new page" area, select the visual style you would like to use for new dashboards.
5. In the "Define grid properties" area, indicate whether or not you would like draggable elements on your dashboard to automatically align themselves with gridlines when you work in freeform layout mode.

6. In the "Gridline" area, select the type of grid you would like to see while editing dashboards in freeform layout mode:
   - None
   - Small
   - Medium
   - Large
7. In the "Default Browsing" area, indicate whether you would like to browse by **folder** or **category** from within Dashboard Builder.
8. In the "Accessibility Option" area, indicate whether you want to view and edit analytics in a web-based environment which is compliant with Section 508 accessibility standards when applicable.
9. In the "Rich Client Option" area, indicate whether you would like to use Adobe Flash versions of analytics when possible.
10. In the "Dashboard View Option" area, indicate whether you would like to view dashboards in **full view**, without the InfoView toolbar, or within the workspace in **default view**.
11. In the "Display scroll bars for dashboard contents" area, indicate whether or not you would like to display scroll bars on overflowing content. Disabling this option may hide some of the dashboard's content.
12. In the "Change initialization logon user" area, you can indicate a different user name and password with which to initialize the Dashboards and Analytics servers. You only need to edit this setting if you are unable to connect to Dashboards and Analytics, and must contact your system administrator before doing so. For more information, see the *Dashboard and Analytics Setup Guide*.
13. In the "Enable Client Tracing" area, indicate whether or not you would like to be able to view all client-server activity in Dashboard and Analytics.
14. Click **OK**.

Changing your password

You can change the password that you use to log on to InfoView.

To change your password

1. Log on to InfoView.
2. On the InfoView toolbar, click **Preferences**.
3. Click the **Change Password** section.
4. Type your old password in the **Old Password** field.
5. Type your new password in the **New Password** field, confirm it in the **Confirm New Password** field, and then click **Submit**.

You must use the new password the next time that you log on to InfoView.

Working with Objects

chapter 4

Overview

This section describes how to access, organize, and work with objects in InfoView. It also contains information on how to search for objects and how to schedule them, so that they will collect new data at a specified time.

Objects are all of the documents and files in your BusinessObjects Enterprise system. Hyperlinks, shortcuts, custom My InfoView page layouts, Crystal reports, Web Intelligence documents, Voyager workspaces, and Desktop Intelligence documents are all examples of objects that might be in your BusinessObjects Enterprise system for you to access and use.

There are two ways in which objects are organized in BusinessObjects Enterprise: by folders and categories. Objects must belong to a folder, and they can only belong to one. Categories are an alternate method of organizing objects; objects do not need to be assigned to a category, and can be assigned to several categories.

Folders and categories can be public (or corporate) or personal. Public or corporate folders/categories can be seen by any InfoView user who has the necessary rights, and you can only add or edit objects in them if you have the necessary rights to do so. Personal categories or your My Favorites folders are for your use; you can create new folders and categories and arrange objects within them as you wish. These are private and cannot be seen or altered by other InfoView users, although your BusinessObjects Enterprise administrator can edit them if need be.

BusinessObjects Enterprise also includes a messaging system which allows you to send objects or instances (or shortcuts to objects/instances) to other users. You can send objects from the document list as you browse, or instances from the "History" page. To view objects that have been sent to you, go to the **Document List** and click **My Inbox**.

Tip:
Right-click the title of an object to access all of the actions that you can perform on the object. For example, to view the history of an object, right-click the object, and select **History**.

Navigating through folders or categories

Folders and categories are used to organize objects in InfoView.

Note:
You must not use the back button of your web browser to navigate within InfoView or any portion of BusinessObjects Enterprise.

To navigate through folders or categories

1. In the InfoView toolbar, click **Document List**.
2. Click **Switch to Folders** or **Switch to Categories** to view the folders/categories that are available to you in InfoView.
3. Expand a folder/category to view any subfolders/subcategories.

   Tip:
   To expand a folder/category, click the plus symbol beside the folder/category name.

4. In the Tree panel, click a folder/category to view the objects that are in the folder or assigned to the category.

   The objects appear in the Details panel.

Related Topics
- *Organizing objects* on page 66

Accessing objects in your personal folders or inbox

To access your folders or your Inbox

1. On the InfoView toolbar, click **Document List**.
2. Click **Switch to Folders**.

   InfoView folders are displayed in the "Tree" panel. By default, **My Favorites**, **Inbox**, and **Public Folders** are displayed.

3. Click **My Favorites** or **Inbox**.

Viewing objects

Selecting which objects to display

By default, when you view the contents of a folder or category, InfoView shows you all of the objects that you have the rights to see. If you want to limit the type of objects that are displayed to make a search easier, then you can choose to display only objects of a specific type. Object types include Crystal reports, Web Intelligence documents, Excel spreadsheets, PowerPoint presentations, program objects, text files, and many others.

To select the type of objects that are displayed

1. In the Details panel, click **Type**.
2. Select the type(s) of object that you want to see.

   Tip:
   To see all of the objects again, select **All Types** from the **Type** list.

3. Click **OK**.

   Only objects of the type(s) you selected are displayed in the Details panel.

Opening objects for viewing

When you view a Crystal report, Desktop Intelligence document, or Web Intelligence document in InfoView, your user rights and the default settings chosen by your administrator determine the data that you see. You may view the report with data directly from the data source, the latest instance of the object, or its saved data. If you have the necessary rights, you may also be able to refresh the report or document with new data from its data source.

Note:
Refreshing an object may use a considerable amount of system resources. Refresh an object only when you think it is likely that the data has changed.

To view an object

1. Navigate to an object and double-click its title to open it.
   The object is now open for viewing.
2. To view the object on demand, click **Refresh** in the object viewer. To view an older instance, select the object in the Details panel, click **Actions** and choose **History** in the InfoView Workspace toolbar. Then double-click the instance that you want to view.

   Note:
   If these options are not enabled, you do not have the necessary rights to access them for the object.

Related Topics

- *Scheduling objects* on page 69
- *Viewing object history* on page 99

Changing viewers

Depending on the objects that you want to view, several viewers may be available for you to use.

Related Topics

- *Setting Preferences* on page 29

Searching in InfoView

This section explains searching in InfoView. You can complete simple searches, which will match your search input to the keyword, title, description, and owner information about objects.

After you perform a simple search, it is displayed in the "Tree" panel. This enables you to search within your search results and refer back to them during your InfoView session.

You can also perform advanced searches. An advanced search works the same way as a simple search, except that you can indicate that all search results must meet other requirements. Advanced searches can enable you to search several top-level areas at once, and can be used to search all objects in InfoView.

If you need to search the text within certain types of objects, you can do so using Content Search. Content Search looks for your search input in the fields that are searched during a simple or advanced search, as well as within the text and other information in certain types of objects. It also enables you to use more powerful search techniques. For more information, see *Content Search* on page 59.

Note:
Simple searches are executed on all the objects in the folder or category that you have selected in the Tree panel, including all child objects and folders/categories. You cannot perform a simple search on public folders/categories and personal folders/categories at the same time.

Searching for objects

You can do a structured search to find objects in InfoView. This is the simplest kind of search, in which the text string you enter is matched to text strings in the specified field(s) of each object's properties.

Note:
Simple searches are executed on all the objects in the folder or category that you have selected in the Tree panel, including all child objects and folders/categories. You cannot perform a simple search on public folders/categories and personal folders/categories at the same time.

To search for an object

1. In the **Document List**, navigate to the folder you would like to search.

   Note:

   Simple searches are executed on all the objects in the folder or category that you have selected in the "Tree" panel, including all child objects and folders/categories. You cannot perform a simple search on public folders/categories and personal folders/categories at the same time.

2. Type the word(s) that you want to locate in the **Search** field.

3. Click the list beside the search field to specify your search parameters with the following criteria:
   - **Search all fields**
   - **title**
   - **keyword**

   You can also click **Advanced Search** to see additional options that allow you to search for objects by location, description, owner, type, and the time when an object was last modified. For more information, see *Performing advanced searches* on page 57.

   If you have the necessary rights and your administrator has enabled Content Search, you can also search the content within objects. For more information, see *Content Search* on page 59.
4. Click **Search**.

   A list of objects that match your search parameters appears.

   Note:
   Until you navigate away from your search results, subsequent searches will be executed on your search results.

   Your search results are saved as a node in the Tree panel. Until you log off of InfoView, you can navigate back to the results of your simple search.

Performing advanced searches

You can perform an advanced search on all documents in InfoView. Advanced searches allow you to perform more specific searches for objects based on their keywords, title, description, owner, type, or last modification time. You can combine these fields in any combination to create more complex searches that will return more useful information.

For example, you may work in finance. You know you've read a sales report for the last year, but you can't remember where you saw it. You think it was in a public folder or your BusinessObjects Enterprise inbox, and you know that it was uploaded by your manager sometime between the end of the last fiscal year and the end of the first month of this fiscal year. You remember that it was a Web Intelligence document. To find the report, you can indicate all of the above search parameters using advanced search, and only documents that meet all of the requirements will be returned.

To perform an advanced search

1. In the **Document List**, choose **Advanced Search** from the menu beside the search field.

   The "Advanced Search" page appears.
2. Select the locations in which you'd like to search:
   - **Public Folder**: Searches objects in all public folders.
   - **Private Folder**: Searches objects in all of your my Favorites folders.
   - **Inbox Folder**: Searches objects in your BusinessObjects Enterprise inbox.
   - **Corporate Categories**: Searches objects that have been assigned to one or more corporate categories.
   - **Personal Categories**: Searches objects that have been assigned to one of more of your personal categories.

   You can select more that one location in which to search. To search all objects, you must select **Public Folder**, **Private Folder**, and **Inbox Folder**. The folder or category that you were viewing or was selected when you navigated to the "Advanced Search" page will not affect the folders and categories searched.
3. Type keywords you wish to search for in the **Keyword** field.
4. Type words or a text string that should appear in the title of result objects in the **Title** field.
5. Type words or a text string that should appear in the description of result objects in the **Description** field.
6. Type the name of the user who added the object in the **Owner** field.
7. Choose the type of object you are searching for from the **Type** list.
8. If you would like to indicate a time range for the last modification date of all returned objects, select **Search by last modification time**. Indicate the **Start** and **End** times in the appropriate fields.

   If you do not wish to search by last modification time, ensure that **Don't search by time** is selected.
9. Click **Search**.

A list of objects that match your search input appears.

Content Search

Content Search is an optimized search tool that enables you to search within the content of objects managed by BusinessObjects Enterprise. These objects include Crystal reports, Web Intelligence and Desktop Intelligence documents, Microsoft Word, and Excel documents, RTF, PDF, and TXT files.

Content Search also allows you to take advantage of several other features to make finding information easier, such as search result grouping, matched word highlighting, suggested searches, and multilingual searching. For more information and information on other features, see *Content Search features* on page 60. You can also use search techniques to make your search string return better results. For more information, see *Search techniques* on page 64.

Searching within objects

In addition to the options for search including Search keyword, Search title, and Search all fields, and Advanced search, you can now search for objects by using the **Search content** option in InfoView.

Content searches are performed on all objects in InfoView, unless they have been expressly excluded from Content Search by a user with the necessary rights.

To search within the content of objects

1. On the InfoView toolbar, click **Document List**.
2. On the InfoView Workspace toolbar, type the word(s) that you want to locate in the **Search** field. See *Search techniques* on page 64 for more information about how to input your search terms.
3. Click the list beside the search field and choose **Search Content**
4. Click **Execute search**.

   A list of objects that match your search parameters appears.
5. Double-click on a document link to view its content.

If you double-click on a Web Intelligence or Crystal report, the viewer will scroll to the place in the report where the first match of the search word occurs.

Note:
This feature only works for HTML viewer, and not for Java and ActiveX viewer.

Content Search features

Below is a list of new functions which comprise Content Search:

Search content

You can search within the content of objects by selecting the Search content option in InfoView.

Search within mixed-language objects

You can search within a mixed-language object by entering a search input which consists of multiple languages. The following are several examples of searches with more than one language. Results will be produced if the words in both languages are found in a document.

沖縄県 Sales

증가 추세 Secteur industriel

Wereldwijd bankieren ingresos alertas

Energie Einnahmen 去年

制造业 Industria di stato

沖縄県 Sales

Search techniques

You can search using techniques similar to those used in other search engines.

Suggestions for alternate spelling

The system suggests up to five alternate spelling suggestions if a search input is misspelled or yields no results. The suggestion is made by substituting words in the original input with words from the system that are similar in spelling to the original one. For example, if you search for “Euroe sales trent”, the system recognizes the misspelled words and provides a suggestion of “Europe sales trend”.

Note:

- An alternate suggestion is made only if the original search input produced no results and the suggested search term will result in successful matches.
- This functionality does not apply to text in Chinese, Japanese or Korean.

Suggested query

When a search is executed, the system automatically generates suggested new documents based on your search input. When you execute your search, you may realize that none of the result documents contain the information you wanted to find, or that there were no results. In this case, suggested documents generated by the system may answer your questions instead.

Suggested documents are created by interpreting the search input and comparing it to the structure of the universes and data in existing documents. For example, if you search for “Mexico sales 2006”, Content Search may see that “sales” is a measure in a universe that houses all sales data for your company. It may also see that in another document, the field “country” was equal to “Mexico”, and use this to filter your data accordingly. It may also see that “2006” is a predefined filter. It will then create a document using the data from the universe, and the filters it identified. You can then view and edit the new document.

You can click on the link **Run Query** to view this generated document and save it if desired. Clicking on **Edit Query** will open the document for editing, so that you can make further refine the query as needed.

Note:
In this release of Content Search, suggested new documents will only be in the format of a Web Intelligence report.

Matched word highlighting

When the text you are searching for matches the words in an object's title or description, the matched words will be highlighted in yellow.

Search result grouping

Some searches may return too many results to look at all of them easily. Content Search uses information in and about the results to classify them into groups, or facets. The various facets that search results can be classified by include document type, public category, data in reports, and aspects of the report content. You can select a group, and see the search results that are part of that group.

For example, you may search for "2006 sales by employee". The public category facet could include "HR Reports", "Legal Documents" and "Sales reports", because each of these categories has objects assigned to it that appear in your search results. You were looking for a sales report, so you click on "Sales report" to see only search results assigned to that category.

Facets that are based on report content use fields or variables that exist in many documents to create the facets. For example, the variable "Product" might be used in many sale reports, and Content Search creates a facet for it. You would then be able to refine your search by product name to see only results related to that product.

After you have refined your search, you can either close the refinement to return to the full list of results, or refine the list further by selecting options from other facets. All refinements currently in effect are displayed at the top of the search refinement panel.

Note:
Facet grouping by fields in report content is only available for Crystal reports and Web Intelligence documents.

Search result ranking

Each object on the search result page is assigned a score ranging from 1 to 5 bars depending on its relevance to the search input. A score of 5 bars indicates the object is a strong match, while a score of 1 bar indicates a weak match.

Related Topics

- *Searching within objects* on page 59
- *What gets searched with Content Search* on page 63
- *Search techniques* on page 64

What gets searched with Content Search

The table below outlines the main content that gets searched when using Content Search in the following objects:

Object type	What gets searched
Crystal reports	Title, description, selection formula, saved data, text fields in any section, parameter values, and sub-reports (for saved data reports), and text in the title and axis of charts. Both reports with and without saved data are searchable.
Web Intelligence and Desktop Intelligence documents	Title, description, name of the Universe filters used in the report, constants in the filter condition locally defined in the report, name of the Universe measures used in the report, name of the Universe objects used in the report, data in record set, and static text in cells. Both reports with and without saved data are searchable.

Object type	What gets searched
Microsoft Excel documents	Data in cells, fields on the Summary page of the document properties (title, subject, author, manager, company, category, keywords and comments), and text in document headers and footers. For cells that use calculations or formulas, the value after the evaluation is searchable.
Microsoft Word documents	Text in all paragraphs and tables, fields on the Summary page of the document properties (title, subject, author, manager, company, category, keywords and comments), text in document headers and footers, and numerical text.
RTF, PDF and TXT Files	All text in these files is searchable.

Note:

Search for the following objects remains unchanged. You can search for the keyword, title, or description of these objects.

- Hyperlink
- Program
- Object Package
- Publication
- Single dashboard (My InfoView)
- EPM dashboard
- EPM analytics

Search techniques

Content Search is an optimized search tool which allows you to execute a search by using techniques similar to that used in other search engines. The table below outlines the different ways a search can be executed using the Search content option.

Note:
Search content is NOT case sensitive. Entering a search term report will produce the same results as the term REPORT.

Technique	Example	Description
Separating search terms with spaces	`finance report`	Search results will be produced only when all the words are found in the document. **Note:** Separating search terms with a space implies an AND separation.
Enclosing search input in quotations	`“total sales growth”`	Search results will be produced only when the exact phrase is found in a document.
Preceding search terms with a +	`episode +I`	Search results will be produced only when all the words are found in the document. This technique is useful to search for words that are typically filtered out during search process. For example; a, for, by, is, the.
Preceding search terms with a -	`Europe sales -revenue`	Search results will be produced only if the word immediately after the - sign is NOT found, and all other words are found.
Separating search terms with a capitalized OR	`bug OR defect count report`	Search results will be produced if any of the words used with OR are found in the document.

Technique	Example	Description
Combining different search techniques	`marketing OR sales -finance “increase OR decrease trend”`	This example will produce results if a document contains the word `marketing` or the word `sales`, and contains the phrase `increase or decrease trend`, but does not contain the word `finance`.

Organizing objects

This section explains how to organize objects in InfoView, including how to create folders and categories, set the properties of folders and categories, add objects to folders and categories, and sort objects.

Creating folders or categories

Folders and categories that are accessible to all users are typically created for you by your BusinessObjects Enterprise administrator. However, if you have the necessary rights, you can also create folders and/or categories in InfoView.

BusinessObjects Enterprise includes two types of folders:

- "My Favorites "

  You can create any number of "My Favorites" folders to organize your objects in InfoView. The folders that you create appear under "My Favorites" in the "Tree" panel. You can add objects to your "My Favorites" folders, as well as create shortcuts to or copies of objects in public folders. You can also create new objects. You are the only user with access to your "My Favorites" folders in InfoView, although administrator can manage them as well.

- Public Folders

Public folders are typically created by the administrator or the users who have been granted the necessary rights. If you have the appropriate rights, you can create public folders to contain objects viewable to other users, if they have the necessary rights.

BusinessObjects Enterprise includes two types of categories:

- Personal categories

  You can create any number of personal categories to organize your objects. The categories that you create appear under **Personal Categories** in the "Tree" panel.

- Corporate categories

  Corporate categories are typically created by the administrator or the users who have been granted the necessary rights. If you have the appropriate rights, you can create corporate categories.

To create a folder or category

1. In the InfoView toolbar, click **Document List**.
2.  Click **Switch to Folders** or **Switch to Categories**.
3. Go to the folder/category where you want to add a new folder/category.
4. Click **New** and select **Folder** or **Category**.
5. When prompted, type a name for the new folder/category.
6. Click **OK**.

Setting the properties of a folder or category

You can edit the properties of folders or categories that you have created or to which you have the necessary rights. This enables you to change the name, description, and keywords of the folder or category. Keywords can be used to search for folders and categories.

To set the properties of a folder or category

1. In the InfoView toolbar, click **Document List**.

2.   Click **Switch to Folders** or **Switch to Categories**.
3. Go to the folder/category that contains the folder/category you want to edit and select it.
4. Click **Actions** and select **Properties**.
5. Edit the information on the properties page.
6. Click **OK**.

Adding objects to a folder

If you have the necessary rights, you can add objects to a folder by adding new objects to InfoView, or add multiple objects to BusinessObjects Enterprise using the Publishing Wizard. For details, see *Adding objects to InfoView* on page 102 and the Publishing Wizard section in the *BusinessObjects Enterprise Administrator's Guide*.

You can also create new objects in InfoView if you have the necessary rights. For more information, see *Creating new objects in InfoView* on page 101.

Assigning objects to a category

Like folders, categories can be used to organize objects. You can assign objects to one or more categories, and you can create subcategories within categories.

BusinessObjects Enterprise includes two types of categories:

- Personal categories

  You can create any number of personal categories to organize your objects in InfoView. The categories that you create appear under Personal Categories in the Tree panel.

- Corporate categories

  Corporate categories are typically created by the administrator or the users who have been granted the necessary rights. If you have the appropriate rights, you can create corporate categories.

To assign an object to a category

1. Go to the folder that contains the object that you want to assign to a category.
2. Select the object, click **Actions** and choose **Categories**.

   The "Categories" page appears.
3. Select the categories you want to assign the object to.

   Tip:
   To expand a category, click the plus symbol beside the category name.
4. Click **OK**.

Sorting objects

By default, objects are sorted alphabetically by title. You can reverse this order, or you can sort the object by last run date, type, or owner.

To sort objects, click the heading of the column by which you want to sort. For example, to sort the objects by title, click the **Title** column heading. To sort the objects by owner, click the **Owner** column heading. You can also sort objects by **Last Run**, **Type**, and **Owner**.

When you click the column heading, the system sorts the objects in ascending order. If you click the column heading again, it sorts the objects in descending order.

Scheduling objects

Scheduling an object allows you to run it automatically at specified times. When a scheduled object runs successfully, an instance is created. An instance is a version of the object that contains data from the time that the object was run.

You can see a list of instances by looking at an object's history, and you can view any of the instances. If you have the rights to view objects on demand, you can view and refresh any instance to retrieve the latest data from the data source.

By scheduling and viewing instances, you can ensure that the objects have the most up-to-date information available for viewing, printing, and distributing.

Note:
Before you schedule objects, be sure to check your time zone setting on the Preferences page in InfoView. The default time zone is local to the web server that runs BusinessObjects Enterprise, not the CMS to which users connect. Set the time zone to ensure that your scheduled objects are processed in accordance with the time zone in which you are working.

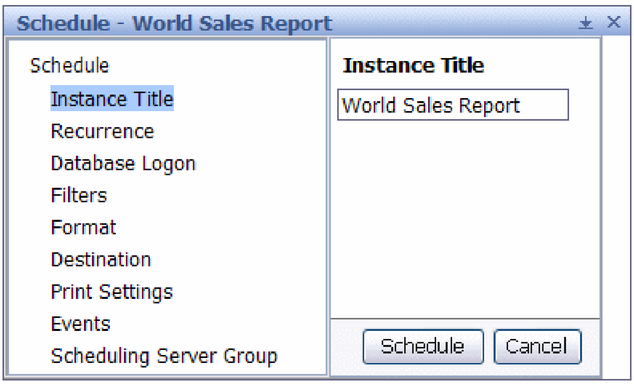
Related Topics

- *Setting Preferences* on page 29

To schedule an object

1. Go to the folder that contains the object that you want to schedule, select the object, click **Actions** and **Schedule**.

   The "Schedule" page appears.



2. Specify the scheduling options that you want to use.

   For more information about each option, see the following sections:

   - Instance Title: *Setting the instance title* on page 71
   - Recurrence: *Choose a recurrence pattern* on page 71
   - Notification: *Enabling notification* on page 73

- Database logon information: *Specifying database logon information* on page 74
- Formats: *Specifying an instance format* on page 74
- Destinations: *Destination locations* on page 85
- Filters: *Applying record selection formulas* on page 91
- Print: *Printing an instance* on page 92
- Caching: *Caching Web Intelligence and Desktop Intelligence documents* on page 95
- Events: *Scheduling with events* on page 93
- Server Group: *Choosing a server to run a scheduling job* on page 94
- Parameters / Prompts: *Scheduling an object with Prompts or Parameters* on page 95

Note:
For some scheduling options, the settings that the administrator has specified for the object are already selected when you choose that option. You can schedule an object with these options or choose your own options.

3. Click **Schedule**.

Setting the instance title

You can type a name to be used for each scheduled instance. Type the name in the **Instance Title** field.

Choose a recurrence pattern

This option specifies a schedule for running an object. Each parameter in the Run object list has its own specific data entry requirements.

The following parameters are available:

- **Now**

  When you click Schedule, the object runs once (immediately).

- **Once**

  This option requires a start and end time parameter. The object runs once at the time that you specify. If you schedule the object with events, the object will run once if the event is triggered between the start and end times.

- **Hourly**

  This option requires information in hours and/or minutes for how frequently the object is run. Instances are created regularly to match the parameters that you enter. The first instance is created at the start time that you specify, and the object will cease to run on its hourly schedule at the end time that you specify.

- **Daily**

  This option requires a start and end time parameter. The object runs once every N days at the time that you specify. It will not be run after the end time that you specify.

- **Weekly**

  This option requires a start and end time parameter. Each week, the object runs on the selected days at the time that you specify. It will not be run after the end time that you specify.

- **Monthly**

  This option requires a start date and time, along with a recurrence interval in months. The object runs on the specified date and time every N months. It will not be run after the end time that you specify.

- **Nth Day of Month**

  This option requires a day of the month on which the object is run. Instances are created regularly each month on the day that you enter at the start time that you specify. The object will not be run after the end time that you specify.

- **1st Monday of Month**

  This option requires a start and end time parameter. An instance is created on the first Monday of each month at the time that you specify. The object will not be run after the end time that you specify.

- **Last Day of Month**

This option requires a start and end time parameter. An instance is created on the last day of each month at the time that you specify. The object will not be run after the end time that you specify.

- **X Day of Nth Week of the Month**

  This option requires a start and end time parameter. An instance is created monthly on a day of a week that you specify. The object will not be run after the end time that you specify.

- **Calendar**

  This option allows you to select a calendar of dates. (Calendars are customized lists of schedule dates that are created by the BusinessObjects Enterprise administrator.) An instance is created on each day that is indicated in the calendar, beginning at the start time that you specify and continuing until the end time that you specify.

You can set how many times the server should attempt to run the job if it fails in the **Number of retries allowed** field. You can also set the amount of time the server should wait before retrying in the **Retry interval in seconds** field.

Enabling notification

Email notification allows you to send an email to an address you supply when your scheduled object has run successfully or if it has failed to run.

You can also enable audit notification to log the success or failure of a scheduling job in the auditing database. Administrators use this information to monitor BusinessObjects Enterprise.

To enable audit notification

1. On the "Schedule" page, click **Notification**.
2. Click **Audit Notification**.
3. Select the checkboxes for when you want to audit—if your job runs successfully, if it fails to run, or both.
4. Set any other scheduling parameters as required, and then click **Schedule**.

To enable email notification

1. On the "Schedule" page, click **Notification**.
2. Click **Email Notification**.
3. Select the checkboxes for when you want to be notified—if your job runs successfully, if it fails to run, or both.
4. Expand the section(s) for the outcome(s) in which you want to be notified.
5. Enter the information about where you want the email to be sent.
   - If you select the **Use the Job Server's defaults** option, the notification is emailed to the email recipients that are configured on the job server.
   - If you do not select the **Use the Job Server's defaults** option, you can specify the recipients to whom you want to email copies of the notification. Separate multiple emails with semicolons.
6. Set other scheduling parameters as required, and then click **Schedule**.

Specifying database logon information

Some objects require you to log on to a database before you can successfully schedule them. You can do this on the "Schedule" page if you have credentials for the object's data source.

To schedule an object with database logon information

1. On the "Schedule" page, click **Database Logon**.
2. If necessary, change the logon information for the object's data source.
3. Set any other scheduling parameters as required, and then click **Schedule**.

Specifying an instance format

Depending on the type of object that you choose to schedule, you can select the format in which the object's instance is saved when it is generated by BusinessObjects Enterprise.

Available formats

The following are the formats to which specific object types can be sent or scheduled.

Crystal report formats

For Crystal reports, you can select from the following formats:

- Crystal Reports
- Microsoft Excel (97-2003)
- Microsoft Excel (97-2003) (Data Only)
- Microsoft Word (97-2003)
- PDF
- Rich Text Format (RTF)
- Microsoft Word (97-2003) — Editable (RTF)
- Plain Text
- Paginated Text
- Tab Separated Text (TTX)
- Separated Values (CSV)
- XML

Note:

- When you select a file format other than Crystal Reports, the program preserves as much of the formatting as the export format allows. However, you may lose some or all of the formatting that appears in the report.
- The difference between Excel and Excel (Data only) is that the Excel option preserves the look and feel of your original report, while the Excel (Data only) focuses on preserving data and does not merge cells.
- The Tab Separated Text format places a tab character between values and attempts to preserve the formatting of the report; the Separated Values format places a specified character between values and does not attempt to preserve formatting.

- The Microsoft Word (97-2003) format maintains as much formatting as possible, including graphics. Each object appears in an individual text field. Microsoft Word (97-2003) — Editable format does not preserve as much formatting; text is displayed in lines and images are placed in line with the text. Rich Text Format is similar to Microsoft Word (97-2003).

For more information about the options you must set to schedule a Crystal report to a specific format, please see *Additional formatting options for Crystal reports* on page 77 and the section on Exporting in the *Crystal Reports User's Guide*.

Desktop Intelligence document formats

For Desktop Intelligence documents, you can select from the following formats:

- Desktop Intelligence
- Microsoft Excel
- PDF
- Plain Text
- Rich Text

Publications formats

For more information about possible publication formats, see *Possible formats* on page 221 in the Working with Publishing chapter.

Web Intelligence document formats

For Web Intelligence documents, you can select from the following formats:

- Web Intelligence
- Microsoft Excel
- PDF

To specify an instance format

1. On the Schedule page, click **Formats and Destinations**.
2. Select the format you wish to schedule to.

- For a Web Intelligence or Desktop Intelligence document, select the format.
- For a Crystal report, select the format from the **Format Options** list and click **Switch**.

3. Select additional formatting options as required.

   Some Crystal Reports format options require you to specify additional formatting options. These options vary, depending on the format that you selected.

4. Set other scheduling parameters as required, and then click **Schedule**.

Related Topics

- *Additional formatting options for Crystal reports* on page 77

Additional formatting options for Crystal reports

When you schedule a Crystal report to some formats, you may be required to set additional options. This topic details the additional options for each format to which they apply:

- *Table 4-3: Microsoft Excel (97-2003)* on page 78
- *Table 4-4: Microsoft Excel (97-2003) (Data Only)* on page 79
- *Table 4-5: Microsoft Word (97-2003)* on page 80
- *Table 4-6: PDF* on page 81
- *Table 4-7: Rich Text Format (RTF)* on page 81
- *Table 4-8: Microsoft Word - Editable (RTF)* on page 82
- *Table 4-9: Plain Text* on page 82
- *Table 4-10: Paginated Text* on page 83
- *Table 4-11: Separated Values (CSV)* on page 83
- *Table 4-12: XML* on page 84

Table 4-3: Microsoft Excel (97-2003)

Option	Description
Use the export options defined in the report	To use the export options already defined in the report, select this option. You will not be able to set any of the other additional formatting options.
Set Column Width	• To set the widths of Excel columns based on objects in the report, select **Column with based on objects in the report** and choose a report area from which to take the column widths. • To set a constant column width, select **Constant column width (in points)** and type the width.
Export page header and page footer	• To include the page headers and footers in your instance, choose whether you would like to export them **Once Per Report**, or **On Each Page**. • To exclude the page headers and footers from your instance, choose **None**.
Create page breaks for each page	Select this option to create page breaks.
Convert date values to strings	Select this option to export date values as text strings.
Show gridlines	Select this option to see gridlines in your exported document.

Option	Description
Page range	• To include all pages of the report, select **All**. • To include a page range, select **from:** and type the first page you want to include, and type the last page you want to include in the **to:** field.

Table 4-4: Microsoft Excel (97-2003) (Data Only)

Option	Description
Use the export options defined in the report	To use the export options already defined in the report, select this option. You will not be able to set any of the other additional formatting options.
Set Column Width	• To set the widths of Excel columns based on objects in the report, select **Column with based on objects in the:** and choose a report area from which to take the column widths. • To set a constant column width, select **Constant column width (in points)** and type the width.
Export object formatting	Select this option if you wish to preserve the object formatting.
Export images	Select this option to export the images in your report.
Use worksheet functions for summaries	Select this option to use summaries in the report to create worksheet functions in Excel.

Option	Description
Maintain relative object position	Select this option to maintain the positioning of objects relative to one another.
Maintain column alignment	Select this option to preserve the alignment of text within columns of your report.
Export page header and page footer	Select this option to include the header and footer in your instance.
Simplify page headers	Select this option to simplify page headers.
Show group outlines	Select this option to show group outlines.

Table 4-5: Microsoft Word (97-2003)

Option	Description
Page Range	• To include all pages of the report, select **All**. • To include a page range, select **from:** and type the first page you want to include, and type the last page you want to include in the **to:** field.

Table 4-6: PDF

Option	Description
Use the export options defined in the report	To use the export options already defined in the report, select this option. You will not be able to set any of the other additional formatting options.
Page Range	• To include all pages of the report, select **All**. • To include a page range, select **from:** and type the first page you want to include, and type the last page you want to include in the **to:** field.
Create bookmarks from group tree	Select this option to create bookmarks in your PDF file based on the tree structure of the report. This will make the report easier to navigate.

Table 4-7: Rich Text Format (RTF)

Option	Description
Page Range	• To include all pages of the report, select **All**. • To include a page range, select **from:** and type the first page you want to include, and type the last page you want to include in the **to:** field.

Table 4-8: Microsoft Word - Editable (RTF)

Option	Description
Use the export options defined in the report	To use the export options already defined in the report, select this option. You will not be able to set any of the other additional formatting options.
Page Range	• To include all pages of the report, select **All**. • To include a page range, select **from:** and type the first page you want to include, and type the last page you want to include in the **to:** field.
Insert page break after each report page	Select this option to insert page breaks in your RTF file after each page of the report.

Table 4-9: Plain Text

Option	Description
Number of characters per inch	Type a value between 8 and 16 for the number of characters to include per inch. This setting controls how the text file is displayed and formatted.

Table 4-10: Paginated Text

Option	Description
Use the export options defined in the report	To use the export options already defined in the report, select this option. You will not be able to set any of the other additional formatting options.
Number of lines per page	Type the number of lines of text to include between page breaks.
Number of characters per inch	Type a value between 8 and 16 for the number of characters to include per inch. This setting controls how the text file is displayed and formatted.

Table 4-11: Separated Values (CSV)

Option	Description
Use the export options defined in the report	To use the export options already defined in the report, select this option. You will not be able to set any of the other additional formatting options.
Delimiter	Type the character you want to use as the delimiter.
Separator	Type a character to use to separate values, or select **Tab**.
Mode	Select either standard or legacy mode. In standard mode, you can choose report, page, and group sections to include in your instance. In legacy mode, you cannot set those options.

Option	Description
Report and page sections	If you selected standard mode, indicate whether you want to export report and page sections, and if so, whether or not your want to isolate them.
Group sections	If you selected standard mode, indicate whether you want to export group sections, and if so, whether or not your want to isolate them.

Table 4-12: XML

Option	Description
XML Exporting formats	Select the XML exporting format you wish to use.

Specifying an instance destination

You can schedule an object instance to be sent to a specific destination on your computer, on a network, a default file location, email, or FTP. If your administrator has specified a particular destination for the object, this destination option is displayed. You may be able to update the fields for this destination, or select a different destination. For many of these destinations, you must provide additional information.

To specify a destination

1. On the Schedule page, click **Formats and Destinations**, **Formats and destination**, or **Destination**.
2. In the **Output format and Destination** area, select the destination after you have selected the format you want to schedule to.

Note:

- If you are scheduling a Crystal report, you do not need to choose a format before you choose a destination.
- If you want to use the default destination, leave the destination settings blank.

3. Click **Destinations Options and Settings** or **Destination**, and select **Use the Job Server's defaults** if you wish to use the default settings for that location.

   For example, if you do not select the Use the Job Server's defaults option for Inbox, then you have to specify the user or user group to whom you want to send the instance of the object that you are scheduling.

4. Select **Clean up instance after scheduling** if the instance can be deleted from the server after it runs and is sent to any destinations.
5. Set other scheduling parameters as required, and then click **Schedule**.

Related Topics

- *Destination options* on page 86
- *Specifying an instance format* on page 74

Destination locations

You can schedule, send, or publish objects and publications in BusinessObjects Enterprise to the following destination locations:

- Default Enterprise location

  If you select this option, the instance is saved to the default BusinessObjects Enterprise location (the Output File Repository Server).

- Inbox

  This option saves the instance to the Output File Repository Server and to inboxes as specified:

  - If you select the Use the Job Server's defaults option, copies of the instance are saved to the inboxes that are configured on the job server.
  - If you do not select Use the Job Server's defaults option, you can specify the inboxes where you want to save the instance.

- File location

This option saves the instance to the Output File Repository Server and to the specified file location:

- If you select the Use the Job Server's defaults option, copies of the instance are saved to the unmanaged disk location that is configured on the job server.
- If you do not select Use the Job Server's defaults option, a copy of the instance is saved to the file location that you specify.

- FTP server

  This option saves the instance to the Output File Repository Server and to the specified FTP server:

  - If you select the Use the Job Server's defaults option, a copy of the instance is saved to the FTP server that configured on the job server.
  - If you do not select the Use the Job Server's defaults option, you can specify the FTP server where you want to save the instance.

- Email recipients

  This option saves the instance to the Output File Repository Server and to the specified email recipients:

  - If you select the Use the Job Server's defaults option, copies of the instance are emailed to the email recipients that are configured on the job server.
  - If you do not select the Use the Job Server's defaults option, you can specify the recipients to whom you want to email copies of the instance.

Note:
If you select any option other than “Default Enterprise Location” and choose to use the job server's default option, then the location must already be configured on the appropriate job server by your administrator. For more information, see the *BusinessObjects Enterprise Administrator's Guide*.

Destination options

If you wish to specify options for an object that you are scheduling to a destination (for example, the names of users who should receive the instance in their inbox; the addresses of email recipients, or an FTP server to which you want the instance uploaded), you must enter some destination information that will differ depending on the destination you have chosen.

Note:
These destinations must be configured on the servers that run scheduling jobs. To find out if they are configured on your deployment, contact your BusinessObjects Enterprise administrator.

- *Table 4-13: Inbox* on page 87
- *Table 4-14: File Location* on page 88
- *Table 4-15: FTP Server* on page 89
- *Table 4-16: Email recipients* on page 90

Table 4-13: Inbox

Option	Description
Selected Recipients	Select **Users** or **Groups** from the **Choose** list and select the recipients to whom you wish to send the instance from the list of "Available Recipients". Click **>** to add users or groups to the "Selected recipients" list.
Target Name	• To let BusinessObjects Enterprise generate a name for the instance, select **Automatically generated**. • To use a specific file name, type it in the **Specific name** field. **Note:** You can select variables to be included in the subject from the list beside the field. The variable is added to the end of the text in the box. The variables you can add include the object's title, ID, owner, the date and time, your email address, and your name.

Option	Description
Send As	• To send a shortcut to the instance to your recipients, select **Shortcut**. • To send a copy of the instance to your recipients, select **Copy**.

Table 4-14: File Location

Option	Description
Directory	Type the path to the directory you would like to send the instance to.
File Name	• To let BusinessObjects Enterprise generate a name for the instance, select **Automatically generated**. • To use a specific file name, type it in the **Specific name** field. Indicate whether or not to include the file extension by selecting or deselecting **Add file extension**. **Note:** You can select variables to be included in the file name from the list beside the field. The variable is added to the end of the text in the box. The variables you can add include the object's title, ID, owner, the date and time, your email address, and your name.
User name	Type the user name required to access the file location.
Password	Type the password required to access the file location.

Table 4-15: FTP Server

Option	Description
Host	Type the FTP server.
Port	Type the port used to access FTP. The default port number is 21.
User name	Type the user name required to access the FTP server.
Password	Type the password required to access the FTP server.
Account	Type the account required to access the FTP server, if applicable.
Directory	Enter the path to the directory you would like to send the instance to.
File Name	• To let BusinessObjects Enterprise generate a name for the instance, select **Automatically generated**. • To use a specific file name, type it in the **Specific name** field. Indicate whether or not to include the file extension by selecting or deselecting **Add file extension**. **Note:** You can select variables to be included in the file name from the list beside the field. The variable is added to the end of the text in the box. The variables you can add include the object's title, ID, owner, the date and time, your email address, and your name.

Table 4-16: Email recipients

Option	Description
From	Type a return email address.
To	Type the email addresses to which you would like to send the instance. Separate multiple email addresses with semi-colons.
Cc	Type the email addresses to which you would like to send copies of the instance. Separate multiple email addresses with semicolons.
Subject	Type the subject line of the email. **Note:** You can select variables to be included in the subject from the list beside the field. The variable is added to the end of the text in the box. The variables you can add include the object's title, ID, owner, the date and time, your email address, and your name.
Add attach-ment	Select this checkbox to add the instance to the email as an attachment.

Option	Description
Attachment	If you selected to add an attachment, you can control the name of the attachment. • To let BusinessObjects Enterprise generate a name for the instance, select **Automatically generated**. • To use a specific file name, type it in the **Specific name** field. Indicate whether or not to include the file extension by selecting or deselecting **Add file extension**. **Note:** You can select variables to be included in the file name from the list beside the field. The variable is added to the end of the text in the box. The variables you can add include the object's title, ID, owner, the date and time, your email address, and your name.
Message	Type the message that will appear in the body of the email. **Note:** You can select variables to be included in the body from the list beside the field. The variable is added to the end of the text in the box. The variables you can add include the object's title, ID, owner, the date and time, your email address, and your name.

Applying record selection formulas

If an object includes a record or group selection formula, you can modify it before you schedule it. Selection formulas help determine what data appears in a report and may improve performance by eliminating unwanted records. For more information about record selection formulas, see the *Crystal Reports User's Guide*.

To apply a record selection formula

1. On the Schedule page, click **Filters**.
2. Change the record or group selection formula as necessary.
3. Set other scheduling parameters as required, and then click **Schedule**.

Printing an instance

When you schedule a Crystal report or a Desktop Intelligence document, you can choose to print the object instance once it has been generated.

To set the print settings for a Crystal report

1. On the Schedule page, click **Print Settings**.
2. To print the report, select **Print a copy of the report in Crystal Reports format when scheduling**. If you do not want the report to be printed, ensure that the **Print a copy of the report in Crystal Reports format when scheduling** is not selected.
3. To use the default printer, select **Default printer**. To use another printer, select **Specify the printer** and provide the appropriate printer information accordingly.
4. Type the number of copies you wish to print in the **Number of Copies** field.
5. Under **Print Range**, select **All** if you wish to print all pages of the report or select **Pages** and type the first and last of the pages you with to print.
6. Select whether or not you wish to collate the printed copies of the instance from the **Set collate option to** list.
7. Indicate your scaling preferences in the **Page Scaling** list.
8. If you wish to center each page, select **Center the page**.
9. If you wish to force horizontal pages to fit the paper, select **Fit horizontal pages into one page**.
10. Under **Set the report's page layout**, indicate the layout you want to use.

    If you select **Specify printer settings**, indicate the printer whose settings you wish to use.

If you select **Custom settings**, indicate whether you would like to use standard layout settings or custom layout settings. If you selected **Use custom layout settings**, indicate the orientation and paper size you wish to use.

11. Set other scheduling parameters as required, and then click **Schedule**.

To set the print settings for a Desktop Intelligence document

1. On the Schedule page, click **Print**.
2. Select the **Enabled** option if you want to enable the settings that you specify (in step 3).
3. Select the **Default Printer** option to specify your system's default printer, or select **Specify the Printer** and provide the appropriate printer information.

Scheduling with events

Event-based scheduling provides you with additional control when you schedule objects: you can configure the system so that objects are run only after a specified event occurs. Working with events consists of two steps: creating an event and scheduling an object. That is, once you create an event, you can select it as a dependency when you schedule an object. The scheduled job is then processed only when that event occurs.

You create events in Central Management Console (CMC), and then select the events in InfoView when you schedule objects. For more information about creating events and the CMC, see the *BusinessObjects Enterprise Administrator's Guide*.

To schedule an object with events

1. On the Schedule page, click **Events**.
2. To specify an event that will trigger the scheduled object, select the event in the "Available Events" pane and click **>**.
3. To specify another event that will be triggered on the completion of this scheduling job, click the schedule event in the "Available Schedule Events" pane, and then click **>**.

4. Set other scheduling options as required and click **Schedule**.

   For more information on scheduling with events, see the “Scheduling Objects” chapter in the *BusinessObjects Enterprise Administrator's Guide*

Choosing a server to run a scheduling job

When you schedule an object, you can select the server group that the system uses to run the object.

To set the scheduling server group settings

1. On the Schedule page, click **Scheduling Server Group**.
2. Select the scheduling server group option you want:
   - **Use the first available server**

     This is the default option. BusinessObjects Enterprise uses the server that has the most resources free at the time of scheduling.
   - **Give preference to servers belonging to the selected group**

     Select a server group from the list. This option attempts to process the object from the servers that are found within your server group. If the specified servers are not available, then the object is processed on the next available server.
   - **Only use servers belonging to the selected group**

     This option ensures that BusinessObjects Enterprise uses only the specified servers that are found within the selected server group. If all of the servers in the server group are unavailable, then the object is not processed.
3. If your deployment of BusinessObjects Enterprise uses federation and you wish to run the object at the federation site on which the object is located, select **Run at origin site**.
4. Set other scheduling parameters as required, and then click **Schedule**.

Scheduling an object with Prompts or Parameters

Some objects make use of the parameters feature. Parameters prompt the user to enter information. For report objects, this information may determine what data appears in the report. For example, in a report that is used by sales, there may be a parameter that asks the user to choose a region. When the user chooses a region, the report displays the results for that specific region only.

Note:
In Web Intelligence documents, parameters are called prompts.

You can set parameters on the "Schedule" page. If the object that you schedule does not contain parameters, then the Parameter option does not appear on the "Schedule" page.

To schedule an object with parameters

1. On the Schedule page, click **Parameters** or **Prompts**.

   Note:
   The appearance of the parameter prompts on the "Schedule" page may differ from object to object, depending on how the parameter field was created. Program objects may provide an **Argument** field instead.

2. Click on the value of a parameter to change it. If you are scheduling a Web Intelligence document, click **Modify** to edit prompt values.
3. Set scheduling parameters as required, and then click **Schedule**.

Caching Web Intelligence and Desktop Intelligence documents

When the system runs a scheduled Web Intelligence or Desktop Intelligence document it stores the instance it generates on the Output File Repository Server. You can also have the system cache the report on the appropriate Report Server by selecting a cache format for the document. If you don't select a cache format, the system won't cache the document.

Note:
To select a cache option, the output format you specified for the object must be Web Intelligence or Desktop Intelligence. If you select a different format, the cache options you specify will have no effect.

To select a cache format for Web or Desktop Intelligence documents

1. In the **Document List**, select a Web Intelligence or Desktop Intelligence object.
2. Ensure that the format you are scheduling to is native to the object you are scheduling.
   - If you are scheduling a Web Intelligence document, ensure that you are scheduling to Web Intelligence format.
   - If you are scheduling a Desktop Intelligence document, ensure that you are scheduling to Desktop Intelligence format.
3. Click **Actions**, choose **Schedule**, and click **Caching**.
4. Select the format you want to pre-load the cache with.
5. Select the locale(s) with which to pre-load the cache if you are scheduling a Web Intelligence document.

   When you schedule the Web Intelligence document, BusinessObjects Enterprise generates cached versions of the document in the locale(s) that you specify.
6. Set the rest of your scheduling options and click **Schedule**.

Pausing or resuming an instance

You can pause and resume an object's instance as needed. For example, if a BusinessObjects Enterprise job server is down for maintenance reasons, you may want to pause a scheduled instance to prevent the system from running the object, because scheduling jobs fail when the job server is not running. When the job server is running again, you can resume the scheduled object.

Note:
Pause and resume can be applied only to scheduled instances; that is, they can be applied only to objects that have a status of Pending or Recurring.

To pause an instance

1. Go to the folder that contains the object for the instance you want to pause, select it, click **Actions** and choose **History**.

   The "History" page appears.

2. Select the scheduled instance that you want to pause.
3. Click **Pause**.

To resume an instance after pausing it

1. Go to the folder that contains the object for the instance you want to resume, select it, click **Actions** and choose **History**.

   The "History" page appears.

2. Select the paused instance you want to resume.
3. Click **Resume**.

Scheduling an object package

An object package is a type of object that acts as a container for subobjects or components. They can only be created or edited in the CMC, and can contain any object type that can be scheduled. To add objects to an object package, a user with the necessary access rights must copy the object and paste it into the object package in the CMC. Objects in an object package are then distinct from the object they were copied from and are instead components of the object package. When you schedule an object package, instances are created for each component, allowing you to schedule several objects simultaneously. You cannot schedule a component of an object package on its own.

Scheduling an object package is slightly different from scheduling an individual object, because some scheduling options must be set on an object package level. These scheduling options are recurrence, destinations, events, and server group settings. Other scheduling options are set for each component of the object package. These scheduling options are notification, database logon settings, filters (if applicable), format, print settings, and parameters, prompts, or arguments (if applicable).

To schedule an object package

1. Select the object package, click **Actions**, and choose **Schedule**.
2. Set the instance title, recurrence, destination, events, and sever group settings as you would for any object.

   For more information on these settings, see the following sections:

   - *Setting the instance title* on page 71
   - *Choose a recurrence pattern* on page 71
   - *Destination locations* on page 85
   - *Scheduling with events* on page 93
   - *Choosing a server to run a scheduling job* on page 94

3. Click **Components**.
4. Click on the name of each component to set the notification, database logon, filters, format, print, cache, and parameters / prompts settings as applicable to each component.

   For more information on these settings, see the following sections:

   - *Enabling notification* on page 73
   - *Specifying database logon information* on page 74
   - *Applying record selection formulas* on page 91
   - *Available formats* on page 75
   - *Printing an instance* on page 92
   - *Caching Web Intelligence and Desktop Intelligence documents* on page 95
   - *Scheduling an object with Prompts or Parameters* on page 95

   When you have finished setting the scheduling parameters for a component, click **OK** to return to the scheduling page for the object package and set the remaining scheduling parameters.

Viewing object history

Viewing instances of objects

You can view the instances of objects such as Crystal reports, Web Intelligence documents, Desktop Intelligence documents, publications, and object packages.

To view the latest instance of an object

1. Go to the folder that contains the object that you want to view.
2. Select the object, click **Actions**, and choose **View latest instance**.

   The latest instance of the object appears in its associated viewer.
3.  If you have the necessary rights in BusinessObjects Enterprise, you can click Refresh in the report/document viewer toolbar to refresh the report/document with the latest data from its data source.

Viewing historical instances

BusinessObjects Enterprise saves a history of object instances for scheduled objects that have been run. The history list is arranged chronologically (with the most recent instances listed first) and can contain the following information:

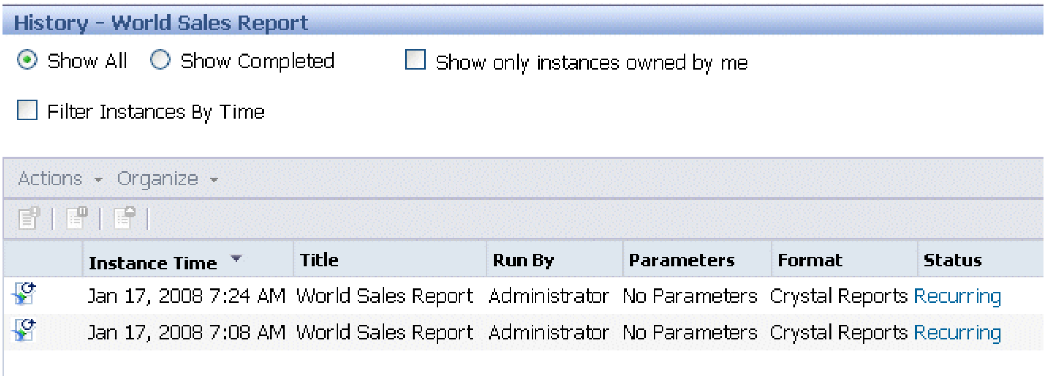
- Instance Time
- Title
- Run By
- Parameters
- Format
- Status
- Reschedule

Note:
The information that is available depends on the type of object that you are viewing. For example, the history page for Desktop Intelligence documents includes Arguments instead of Parameters, and the history page for object packages includes fewer columns.

To view the history of an object

1. Go to the folder that contains the object, select it, click **Actions** and select **History**.

   The "History" page appears.



   You can choose to display all of the available instances or only the instances that you own by selecting the appropriate option from the check boxes on the upper left corner.

2. Double-click a link under the **Instance Time** column to view an object instance.

   Tip:
   Sort instances chronologically by clicking the **Instance Time** column heading. Click the column heading again to reverse the sort order. You can also sort the instances by owner and status by clicking the appropriate column headings.

When you double-click to view an object instance, the instance opens in a viewer that corresponds to the object type.

Deleting an instance

You can delete the instances of any object as needed.

To delete an instance

1. Go to the folder that contains the parent object of the instance you want to delete, select it, click **Actions** and choose **History**.

   The "History" page appears.

2. Select the instances that you want to delete.
3. Click **Delete**.

Sending objects or instances

You can use the Send feature to send existing objects or instances of objects to different locations. You can also send copies of the object/instance or shortcuts to the object/instance.

To view the latest instance of an object

1. Go to the folder that contains the object that you want to view.
2. Select the object, click **Actions**, and choose **View latest instance**.

   The latest instance of the object appears in its associated viewer.

3.  If you have the necessary rights in BusinessObjects Enterprise, you can click Refresh in the report/document viewer toolbar to refresh the report/document with the latest data from its data source.

Creating new objects in InfoView

In addition to working with the objects that your administrator and/or other authorized users have added to InfoView, if you have the necessary rights, you can also create objects in InfoView.

To create an object click **New** in the InfoView Workspace toolbar from the **Document List** and select the type of object that you want to create.

For instructions on how to create specific object types, see the following sections:

- **Single Dashboard** lets you create a new *My InfoView* on page 109 page.
- *Creating hyperlinks* on page 106
- *Overview* on page 216
- *Creating folders or categories* on page 66
- *Working with Voyager Workspaces* on page 159
- *Working with Web Intelligence Documents* on page 149
- *Working with Desktop Intelligence documents* on page 201
- *Overview* on page 212

You can also add existing objects to InfoView. For more information, see *Adding objects to InfoView* on page 102.

As well, for additional information, consult the *BusinessObjects Enterprise Administrator's Guide*, the *Crystal Reports User's Guide*, the *Building Reports with the Web Intelligence Report Panel* help, which is available when you view a Web Intelligence document, the *BusinessObjectsVoyager User's Guide*, and the *BusinessObjects EnterpriseDesktop Intelligence Access and Analysis Guide*.

Adding objects to InfoView

If you have the necessary rights, you can add objects to InfoView from your local computer.

For example, a business analyst has finished creating a report on how a recent merger has affected sales and needs to share it with the rest of the company. When the business analyst adds the report to BusinessObjects Enterprise, everyone in the company with the necessary rights is able to read it.

If you need to add many objects to InfoView simultaneously, please refer to the section about the Publishing Wizard in the *BusinessObjects Enterprise Administrator's Guide*.

For additional information, consult the *Crystal Reports User's Guide*, and the *Building Reports with the Web Intelligence Report Panel* help, which is available when you view a Web Intelligence document.

To add a Crystal report to InfoView

1. In the InfoView toolbar, click **Document List**.
2. Navigate to the folder you wish to add the Crystal report to.
3. In the InfoView Workspace toolbar, click **Add** and select **Crystal Reports**.

   The "Crystal Reports" page appears.
4. Enter a title and keywords for your Crystal report. If you wish to write a description for the report other than the one it was saved with, deselect **Use description from report** and type your description in the "Description" text area.
5. Click **Browse** to choose the Crystal report you wish to add.
6. If you wish to keep the data saved in the report, ensure that the **Keep saved data** check box is selected.
7. Click **Categories** and select any categories you wish to assign the Crystal report to.
8. Click **OK**.

To add a document from your computer to InfoView

1. In the InfoView toolbar, click **Document List**.
2. Navigate to the folder you wish to add the document to.
3. Click **Add** and select **Local Document**.

   The "Local Document" page appears.
4. Enter a title, description, and keywords for your document.
5. Click **Browse** to choose the document you wish to add.
6. If necessary, choose the type of file you are adding from the **File Type** list.

   Note:
   If you chose **Other** from the **File Type** list, enter the MIME type of the file in the **MIME** field.

7. Expand **Categories** and select any categories you wish to assign the document to.
8. Click **OK**.

Copying objects

InfoView allows you to make copies of objects and save them in folders you have the necessary rights to. This enables you to edit the new object while keeping the original version.

The **Copy** command in InfoView copies the object(s) to a clipboard and does not create a copy in the same folder automatically. You must choose the **Paste** command to place your copied object.

Related Topics

- *Creating shortcuts* on page 106

To copy an object

1. In the InfoView toolbar, click **Document List**.
2. Navigate to the object you want to copy and select it.

   Tip:
   You can copy several objects simultaneously by selecting multiple objects at once by holding down the CTRL or SHIFT key and clicking on the objects.

3. Click **Organize** and select **Copy**.

   Your object is now copied to a clipboard.

4. Navigate to the folder in which you want to keep the copy.
5. Click **Organize** and select **Paste**.

Moving objects

If you need to reorganize objects, you can move them by cutting objects from their current location and pasting them into a new location. Cutting an object copies it to a clipboard and deletes it simultaneously. You must then paste it.

For example, consider a company that recently opened a second location. They would like to organize employee reports by location. There are already folders for each location and now they need to move reports about employees who work at the second location to the correct folder.

Note:

- Shortcuts to an object will remain operational after you move it.
- If you cut an object and then cut or copy a second object, only the second action will take effect. You will not lose the first object that you cut.

To move an object

1. In the InfoView toolbar, click **Document List**.
2. Navigate to the object you want to move and select it.
3. Click **Organize** and select **Cut**.

   Note:
   Your object is copied as soon as you click **Cut**. It is not deleted until you paste it in a new location.

4. Navigate to the folder to which you want to move the object.
5. Click **Organize** and select **Paste**.

   Your object now only exists in the folder you pasted it into. Shortcuts to the object continue to function properly.

Deleting objects

If you have the necessary rights, you can delete objects in InfoView.

To delete an object

1. In the InfoView toolbar, click **Document List**.
2. Navigate to the object that you want to delete and select it.
3. Click **Organize** and select **Delete**.

   Note:
   You cannot follow shortcuts to a deleted object.

Creating shortcuts

InfoView allows you to create shortcuts to objects, so that you can easily access them from more convenient locations. The shortcut will appear in the Document List, and will take you to the most recent version of the object.

For example, employees in Human Resources and must refer to a report about employee vacation time daily, and must navigate through several folders to access it. They each create a shortcut to it in their My Favorites folder, so that they can access it directly.

Note:
Shortcuts are objects. You can perform all of the actions you would perform on another object on a shortcut, including setting its properties.

To create a shortcut to an object

1. In the InfoView toolbar, **Document List**.
2. Navigate to the object you want to create a shortcut to and select it.
3. Click **Organize** and select **Copy Shortcut**.
4. Navigate to the folder in which you want to create the shortcut.
5. Click **Organize** and select **Paste Shortcut**.

Creating hyperlinks

If you have the necessary rights, you can create hyperlinks to web pages in InfoView. This enables you to direct users to a website outside of InfoView which contains relevant information, or to keep a link to an important site easily available. Hyperlinks are saved in folders. Click on the title of the hyperlink in the Document List to view the website. You can set your preferences to determine whether the link will open in a new window or in the InfoView Workspace. For information on how to change this setting, see *General preferences* on page 30.

For example, a market analyst recently read an article in a magazine about current spending trends in several key demographics. This article is available online, so the market analyst can share it with you by creating a hyperlink to it in InfoView.

To create a hyperlink

1. In the InfoView toolbar, **Document List**.
2. Navigate to the folder in which you want to create the hyperlink.
3. Click **New** and select **Hyperlink**.

   The "Hyperlink" page appears.
4. Under **General Properties**, enter the title, description, and keywords for your hyperlink.
5. Under **URL**, enter the complete URL of the web page you want to create the hyperlink to, including http://.
6. Under **Categories** select the categories you want to assign the hyperlink to.
7. Click **OK**.

Setting object properties

If you have the necessary access rights, you can change the following properties for an object:

- Title
- Description
- Keywords
- Categories

To set the object properties

1. In the InfoView Toolbar, click **Document List**.
2. Go to the folder that contains the object, select it, click **Actions** and choose **Properties**.
3. Change the title, description, or keywords for the object as needed.
4. Click **OK**.
5. Select the object again, click **Actions** and choose **Categories**.
6. Select any categories to which you want the object assigned.

7. Click **OK**.

My InfoView

chapter 5

Overview

My InfoView is a customized InfoView page layout that contains the objects (for example, reports, documents, and web sites) that you view on a regular basis. These objects are displayed according to settings that you define.

For example, you may work in the legal department. You need to keep track of internal finance reports, but you also need to keep a close eye on regulatory websites. You can create a customized InfoView page layout to show you the reports and websites that you need to see in one convenient view.

You can create more than one customized InfoView page layout. To view a customized InfoView page layout that you have saved, go to the folder that contains it and double-click its title.

Using My InfoView

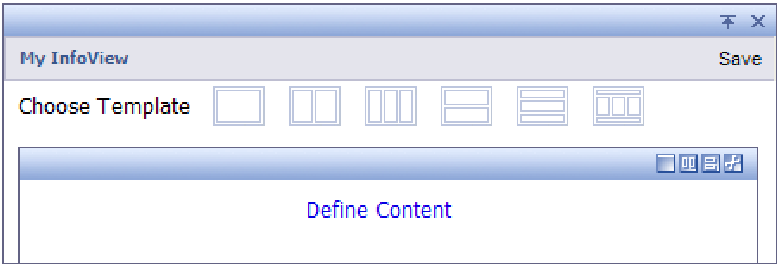
You can create a custom My InfoView page in InfoView to display the web sites, Crystal reports, Web Intelligence documents, and other objects that you frequently view in InfoView.

Note:
You can make My InfoView your initial view. For details, see *General preferences* on page 30.

To define My InfoView content

1. Log on to InfoView.
2. Click **Open** and choose **My InfoView**.

   The My InfoView page appears.



Tip:
You can create a new custom page by clicking **New** and choosing **Single Dashboard** in the **Document List**. To view a custom page you have saved, go to the folder that contains it and double-click its title.

3. Choose a template.

   The templates include frames that determine the layout of the objects in your page. Each box can contain one object.

4. Click **Define Content**.
5. Indicate what you would like to appear in the frame you are defining.

   For example, you can include a web address or an object. You can also specify a header and footer for each box. The header and footers can be a text string that may or may not be linked to a website.

6. Click **OK**.
7. Edit other content areas as required.

    You can use the buttons in the upper right of each content area to edit or view that area; you can open it in a new window, split it vertically or horizontally into two content boxes, edit its properties, or remove it from your page layout.

   When you split a cell horizontally, the uppermost cell retains the content of the cell that you split. When you split a cell vertically, the leftmost cell retains the content of the cell that you split.

8. Click **Save**.

   The system saves the page as My InfoView. The default location of My InfoView is your Favorites folder. To save the page as a new My InfoView page, click **Save As** and enter the information. Then click **OK**.

Editing My InfoView

To edit My InfoView and custom page layouts

1. Click **Open** and choose **My InfoView**.

   Tip:
   Alternatively, you can go to the folder that contains the custom page layout, and double-click its title to open it.

2. Click **Edit**.
3. Make your changes to the page.

    You can use the buttons in the upper right of each content area to edit or view that area; you can open it in a new window, split it vertically or horizontally into two content boxes, edit its properties, or remove it from your page layout.

   When you split a cell horizontally, the uppermost cell retains the content of the cell that you split. When you split a cell vertically, the leftmost cell retains the content of the cell that you split.

4. Click **Save**.

Using Discussions

chapter 6

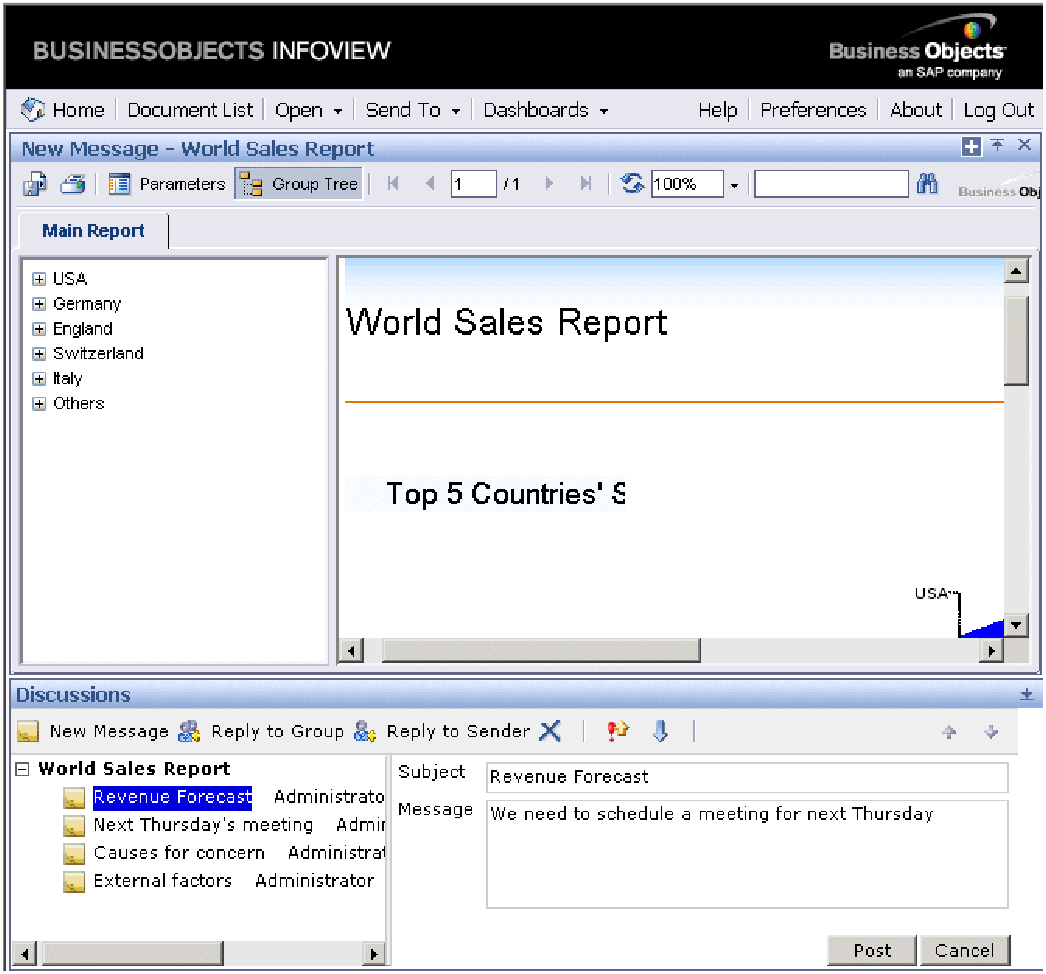
Overview

The "Discussions" feature enables you to create notes for reports, hyperlinks, programs, and other objects in InfoView. BusinessObjects Enterprise users who have the appropriate rights can view notes or add comments to a discussion thread, which is a series of related notes in a hierarchical format. You can create a discussion thread or add notes to a discussion thread for any object you have access to.

Note:
You must have view rights on an object to view the object and its associated notes. If you are not sure whether or not you have the appropriate rights, contact your BusinessObjects Enterprise administrator.

Using the Discussions panel

The "Discussions" panel contains the discussion notes and their related threads. It appears at the bottom of the InfoView window.



The screenshot shows a Crystal report called “World Sales Report”. On the left side of the "Discussions" panel, a browser displays all the notes that belong to the report. The root node is the title of the report. When a user adds a note, the title of the note appears beneath the title of the report. Users can then add to the note to form a discussion thread.

Accessing the Discussions panel

Click **Show/Hide the Discussions Panel** to expand or collapse the "Discussions" panel in InfoView.

Creating a note

You can add notes to an object that you have viewing rights to.

To add a note

1. Log on to InfoView.
2. Select the folder that contains the object you want to add a note to, and click its title to open it.
3. Click **Show the Discussions Panel** to expand the "Discussions" panel.
4. Click **New Message**.
5. In the **Subject** field, enter a heading for your note.

   Note:
   The maximum number of characters that you can use in this field is 255.

6. In the **Message** field, enter your note's message.

   Note:
   The maximum number of characters that you can use in this field is 1,000.

7. You can also flag the importance of your note. Click **High Importance** or **Low Importance** if you want.
8. Click **Post**.

Replying to a note

On the "Discussions" panel, click the plus symbol (+) to expand the levels of notes that are related to the object. You can post a reply to an entire group, or to the person who posted the note. Notes that you have not yet read appear in bold.

To reply to a note

1. In the "Discussions" panel, select the note that you want to edit.
2. Click **Reply to Group** or **Reply to Sender**.

   Note:
   If you choose **Reply to Group,** your reply is available to everyone who has the right to view the notes associated with the object.

3. Edit the contents of the **Subject** field and/or the **Message** field.
4. Click **Post**.

Editing a note

You can edit a note after you create it.

To edit a note

1. In the "Discussions" panel, select the note that you want to edit.
2. Edit the contents of the **Subject** field and/or the **Message** field.
3. Click **Post**.

   Note:
   You cannot edit notes that were created by other users or notes that have replies in a discussion thread, unless you have administrative rights.

Deleting a note

You can delete the notes after you create them.

To delete a note

1. In the "Discussions" panel, select the note that you want to delete.

2.  Click **Delete**.

Note:
You cannot delete notes that were created by other users or notes that have replies in a discussion thread, unless you have administrative rights.

Using Encyclopedia

7 chapter

Overview

"Encyclopedia" provides business intelligence users with essential information about their reports. It enables users to answer the following questions:

- What is the purpose of the report?
- What business questions does it help answer?
- How is it best viewed?
- What terms are used in the report and what do they mean?
- What other reports are related to this one?
- What analysis has been used in the report, and how does it work?

"Encyclopedia" is designed for business users who work in InfoView. It can be used with BusinessObjects Enterprise objects, such as Crystal reports, Voyager workspaces, Web Intelligence documents, Adobe Acrobat PDFs, Microsoft Excel documents, and so on.

Note:
In "Encyclopedia", the words "analytic" and "report" are synonymous.

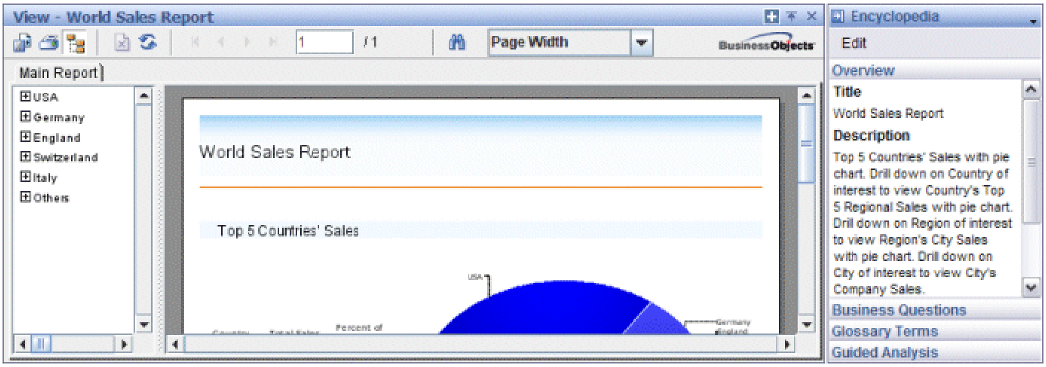
To use "Encyclopedia", you must have a deployment of BusinessObjects Enterprise Premium.

Accessing Encyclopedia

Access "Encyclopedia" from within InfoView. When you click to view an object, you can display the "Encyclopedia panel" to help you interpret the contents of the object.

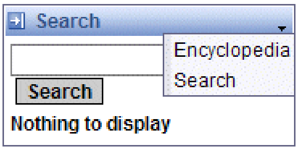
By default, the "Encyclopedia" panel is not displayed when you open an object. To view the panel, click **Open** and choose **Encyclopedia**.

"Encyclopedia" appears on the right side of the screen.



Tip:

- If the "Search" dialog box appears instead of the "Encyclopedia" dialog box, click the arrow and select **Encyclopedia**.



- To close Encyclopedia, click **Open** and choose **Close Encyclopedia**.

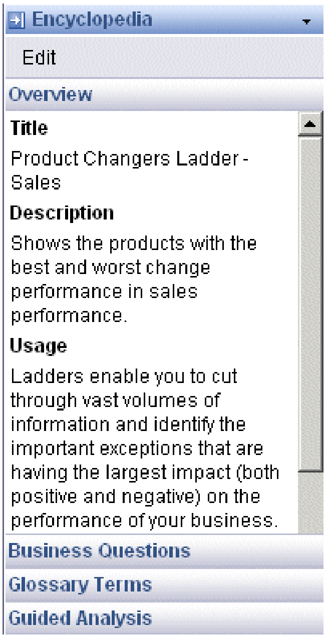
Creating and maintaining Encyclopedia information

If you have the necessary rights in BusinessObjects Enterprise, you can make changes to the information in any of the four main parts of "Encyclopedia".

For information about your rights to modify "Encyclopedia", contact your BusinessObjects Enterprise administrator.

Overview tab

The "Overview" tab is the first area that is displayed onscreen when you open "Encyclopedia".



The **Overview** tab contains the following information:

- "Title"

  The title of the object.

- "Description"

  A brief summary of the object. Users can read the description to determine whether or not the object is useful to them.

- "Purpose"

  A more detailed description of the object and its purpose.

- "Usage"

  An explanation of how to use the object. This information can include the meanings of terms that are used, instructions to interpret charts, tables, and measures, a description of parameters/prompts, and information about any guided analysis that may be associated with the object. (For information about guided analysis, see *Guided analysis* on page 131.)

Editing overview information

To edit overview information

1. In the "Encyclopedia" panel, click **Edit**.
2. Click the **Overview** tab.

   Tip:
   Resize the "Encyclopedia" panel to view all available edit options by dragging the left side of the panel towards the center of the screen.

3. Modify the information in the **Overview** fields.

   Note:
   "Encyclopedia" obtains the information about an object's title and description from the object itself, as defined in the Central Management Server (CMS). As a result, you can't edit the title and description in the panel.

4. Click **OK**.

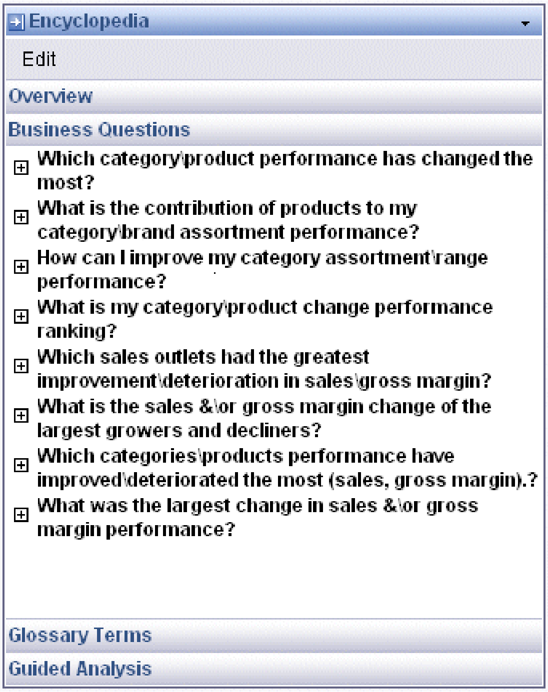
Business questions

A business question is a business-oriented query that is answered by one or more objects in InfoView. Business questions are linked to relevant objects. By selecting a question, users can choose one or more objects to help answer the question.

From the **Business Questions** tab, you can do the following tasks:

- Display a list of objects that are associated with the business questions
- Create a new business question
- Associate a particular business question with an object in InfoView
- Modify an existing business question
- Delete an existing business question

Examples of business questions in the **Business Questions** tab are shown in the following screenshot:



Creating a question

To create a business question

1. In the "Encyclopedia" panel, click **Edit**.
2. In the "Encyclopedia" panel, click the **Business Questions** tab.
3. At the bottom of the panel, enter a new question in the **Business Question** area.
4. Click **New**.

   "Encyclopedia" adds the question to the "Available" area.

   Note:
   For this question to be useful to "Encyclopedia" users, associate it with one or more objects. For more information, see *Associating questions with an object* on page 125.

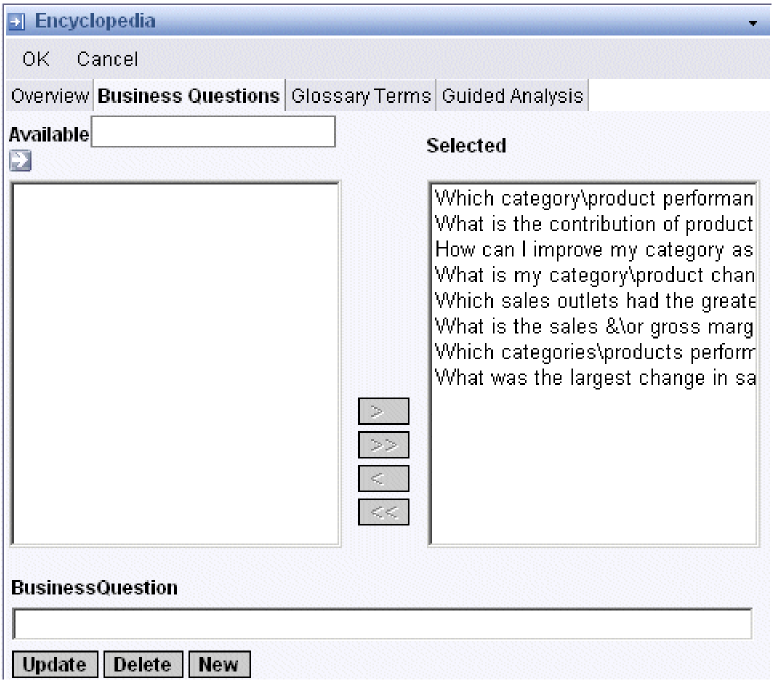
5. Click **OK**.

Associating questions with an object

To associate a business question with an object

1. In InfoView, open the object you want to associate a question with.
2. In "Encyclopedia", click **Edit**.

   The "Edit" dialog box appears.
3. Click the **Business Questions** tab.



   The "Selected" area displays questions that are already associated with the object.
4. Search for the questions you want to associate with the object by performing one of the following actions:
   - Enter text in the text box above the "Available" area, and click **Search**. "Encyclopedia" displays a list of all questions that match the text that you entered.
   - Click **Search** to display a list of all available questions.

5. You can add or remove questions associated with the object:
   - To associate a question with the object, click the question in the "Available" window, and then click **>**.
   - To associate all available questions with the object, click **>>**.
   - To remove an associated question from the object, click the question in the "Selected" window, and click **<**.
   - To remove all associated questions from the object, click **<<**.
6. Click **OK**.

Editing a question

To edit a question

1. In the "Encyclopedia" panel, click **Edit**.
2. Click the **Business Questions** tab.
3. In the "Available" area, select the question you want to modify.

   The question is displayed in the **Business Question** text field.
4. Edit the question.
5. Click **Update**.

   Note:
   You can't update a question that is in the "Selected" area.

Deleting a question

To delete a question

1. In the "Encyclopedia" panel, click **Edit**.
2. Click the **Business Questions** tab.
3. If the question you want to delete is associated with the object that you are viewing, remove the association as described in *Associating questions with an object* on page 125.
4. In the "Available" area, select the question you want to delete.
5. Click **Delete**.

   "Encyclopedia" deletes the business question.

Note:
This action deletes the question completely, so it is no longer available for any other objects it was associated with. Therefore, do not delete a question from "Encyclopedia" unless you do not want it associated with any other objects.

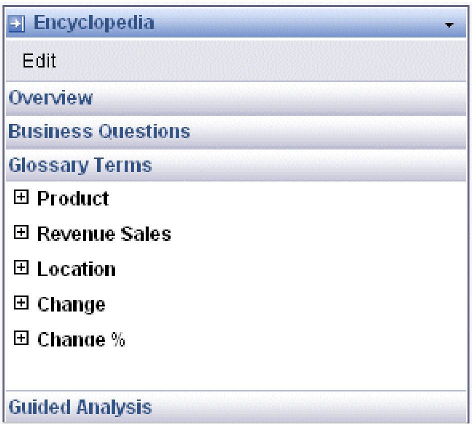
Glossary terms

A glossary term is a definition of a term that is used in the object. These definitions are maintained in "Encyclopedia" and are available to all users as they view objects and navigate around other related objects. Glossary terms are linked to relevant objects.

From the **Glossary Terms** area, you can do the following tasks:

- Display a tooltip description of a term by pointing your mouse at the term
- Display a list of objects with which the term is associated.
- Create a new glossary term
- Associate a particular glossary term with an object in InfoView
- Modify an existing glossary term
- Delete an existing glossary term

Examples of terms in the **Glossary Terms** area are shown in the following screenshot:



Creating a term

To create a glossary term

1. In the "Encyclopedia" panel, click **Edit**.
2. In the "Encyclopedia" panel, click the **Glossary Terms** tab.
3. At the bottom of the panel, type a new term in the **Glossary Term** field.
4. In the **Description** field, type a description for the term.
5. Click **New**.

   Encyclopedia adds the term to the "Available" area.

   Note:
   For this term to be useful to "Encyclopedia" users, you must associate it with one or more objects.

6. Click **OK**.

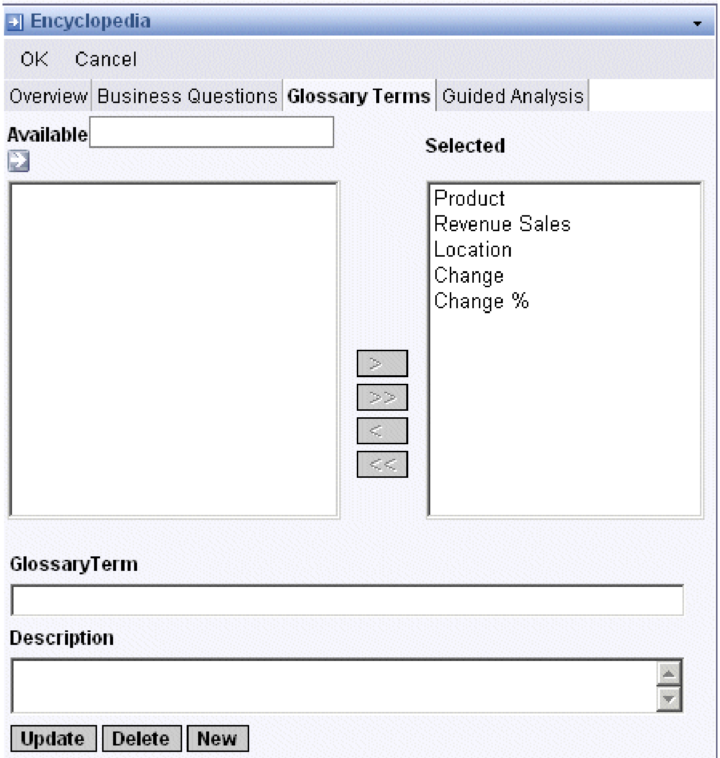
Related Topics

- *To associate a glossary term with an object* on page 128

Associating a glossary term with an object

To associate a glossary term with an object

1. In InfoView, open the object you want to associate a term to.
2. In "Encyclopedia", click **Edit**.
3. Click the **Glossary Terms** tab.



The "Selected" area displays terms that are already associated with the object.

4. Search for terms that you want to associate with the object by performing one of the following actions:
   - Enter text in the text box above the "Available" area, and click **Search**. "Encyclopedia" displays a list of terms that contain the text you entered.
   - Click **Search** to display a list of all available terms without entering any text.
5. You can add or remove questions associated with the object:
   - To associate a question with the object, click the question in the "Available" pane, and then click **>**.
   - To associate all available questions with the object, click **>>**.

- To remove an associated question from the object, click the question in the "Selected" pane, and then click **<**.
- To remove all associated questions from the object, click **<<**.

6. Click **OK**.

Editing a term

To edit a term

1. In the "Encyclopedia" panel, click **Edit**.
2. Click the **Glossary Terms** tab.

   The selected area displays terms that are already associated with the object.
3. In the "Available" area, select the term you want to modify.

   The term is displayed in the **Glossary Term** text field.
4. Enter your terminology changes.
5. Click **Update**.

   Note:
   You cannot update a term in the "Selected" area.

Deleting a term

To delete a term

1. In the "Encyclopedia" panel, click **Edit**.
2. Click the **Glossary Terms** tab.

   The "Selected" area displays terms that are currently associated with the object.
3. If the term you want to delete is associated with the object that you are viewing, remove the association as described in *Associating a glossary term with an object* on page 128.
4. In the "Available" area, select the term you want to delete.
5. Click **Delete**.

   "Encyclopedia" deletes the glossary term.

Note:
This action deletes the term and it is no longer available for other objects it was associated with. Therefore, do not delete a glossary term from "Encyclopedia" unless you do not need to associate it with any other objects.

Guided analysis

Guided analysis provides you with suggested navigation paths—or storylines—through objects in InfoView. When you view an object, a storyline suggests other objects that you may want to view and, if possible, displays a list of the objects in the storyline that lead to the current object that you are viewing. This enables you to show connections between reports.

Consider a company in a volatile industry. Several factors affect its profit margin. One business analyst is assigned to track each factor. At the end of a quarter, each analyst creates a report to summarize the affect of their factor. When the analysts put their reports into storylines, it allows the management team to track each factor's effect during the quarter.

The following is an example of a storyline in the **Guided Analysis** tab:

Following a storyline

To follow a storyline

1. In the "Encyclopedia" panel, click **Guided Analysis**.
2. Select the storyline you want to follow from the list.

   All the objects in the storyline appear in the order they occur, with the object that you are currently viewing clearly indicated.
3. Double-click the name of the object that you want to view.

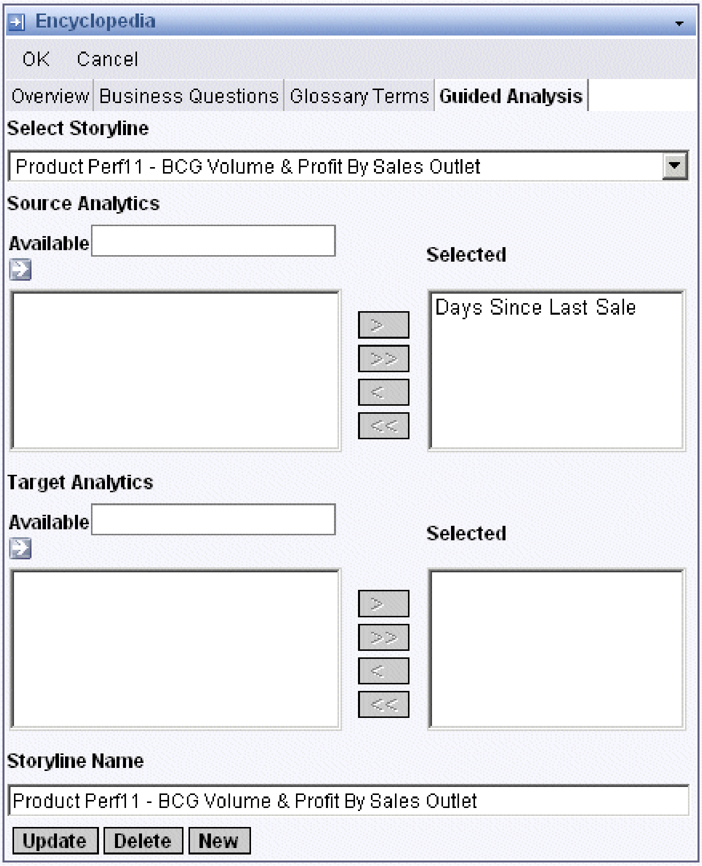
   The object appears in its associated viewer.

Creating a storyline

To create a storyline

1. In InfoView, open the object you want to create a storyline in.
2. Click **Edit** in the "Encyclopedia" panel.
3. Click the **Guided Analysis** tab.

   The "Edit" dialog box appears.



4. In the **Storyline Name** field, enter a title for the storyline.
5. Click **New**.

   "Encyclopedia" adds the storyline to the list.
6. Search for objects that you want to add to the storyline by performing one of the following actions:
   - Enter text in the field above the "Available" area, and click **Search**. "Encyclopedia" displays a list of objects that contain the text that you entered in their title.
   - Click **Search** to display a list of all available questions without entering any text.
7. Add or remove source objects from the storyline:

- To add an object to the storyline, click the object's title in the "Source Analytics Available" window, and then click **>**.
- To add all available objects to the storyline, click “>>”.
- To remove an object from the storyline, click the object's title in the "Source Analytics Selected" pane, and then click “<”.
- To remove all objects from the storyline, click “<<”.

Note:
A source analytic is a report that links to the current report in the storyline; it occurs earlier in the storyline. A target analytic is a report that the current report links to; it occurs later in the storyline.

8. Use the "Target Analytics" windows to add or remove target objects from the storyline using the same methods.
9. Click **OK**.

Editing a storyline

To edit a storyline

1. In the "Encyclopedia" dialog window, click **Edit**.
2. Click the **Guided Analysis** tab.
3. Select your storyline from the **Select Storyline** list.
4. Change the objects that are associated with the storyline if required, as described in *Creating a storyline* on page 132.
5. Click **Update**.
6. Make your changes to the storyline name.
7. Click **OK**.

Deleting a storyline

To delete a storyline

1. In the "Encyclopedia" dialog window, click **Edit**.
2. Click the **Guided Analysis** tab.
3. Select the storyline you want to delete from the list.
4. Click **Delete**.

"Encyclopedia" deletes the storyline.

This action deletes the storyline completely, so it is no longer available from any of the other objects that formed part of the storyline. The objects themselves are not deleted.

Working with Crystal Reports

chapter 8

Overview

When you work with Crystal reports, you can use all of the InfoView features that are described in *Working with Objects* on page 51.

This section describes additional features that are unique to working with Crystal reports, such as drilling, viewing alerts, and distributing reports. It also describes the Crystal Reports Offline Viewer.

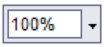
Viewing Crystal reports

When you click on a Crystal report, it is displayed in a viewer. Depending on the type of viewer enabled by your administrator, and chosen by you in your preferences, you can perform a number of activities. The following section provides information about the Crystal reports viewer toolbar and instructions about how to work with your reports.

Note:
For information about the specific functions that are available in each viewer, see *Description of the Crystal report viewers* on page 42.

Crystal Reports viewer toolbar

Option	Description
	**Export this report**: Exports the Crystal report to your local machine or to a location on a network.
	**Print this report**: Prints the report.
 **Group Tree**	**Show/Hide Group Tree**: Shows/hides the "Group Tree". When the "Group Tree" is displayed, you can use it to navigate through the data in your report.

Option	Description
 **Parameters**	**Show/Hide Parameter Panel**: Shows/hides the "Parameter Panel". When the "Parameter Panel" is displayed, you can use it to change the data in your report or how it is displayed. For more information, see *Parameters* on page 141. You can only access the "Parameter Panel" from the *Web viewer* on page 43.
	**Navigation**: Allows you to move through the pages of a report. Go to First Page, Go to Previous Page, Go to Page, Go to Next Page, and Go to Last Page are available options.
	**Refresh Page**: Obtains the most up-to-date data from the report's data source. You must have the necessary rights, and the server must contain the necessary data source information, before you can refresh the report.
	**Search for text**: Allows you to search for the specific instance of a text.
	**Zoom**: Allows you to zoom in or out on a report.

Tip:
You can navigate to different areas of a report using the report tabs after you drill down in the report.

Drilling reports

You can drill down into report data to show the data beneath charts and summarized groups. Click the chart or summarized data to see a drilled down view.

To drill down Crystal reports

1. Open the report that you want to view.

2. In the Crystal report viewer, double-click the links in the report to drill down for more information.

   Tip:
   You can also use the group tree and/or report tabs at the top of the viewing panel to drill down on report data. Click on a report tab to close the drilled-down view of the data.

Looking at alerts

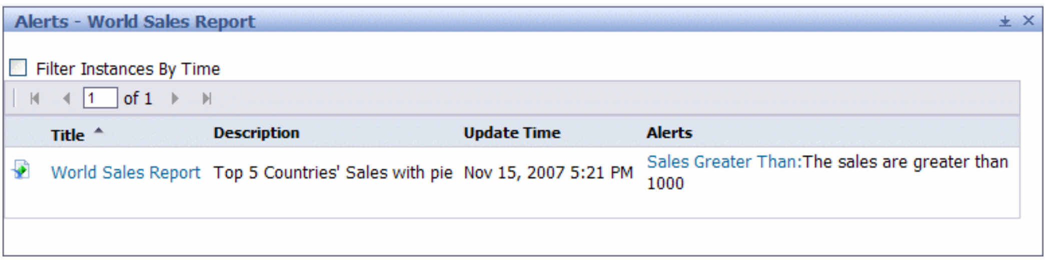
BusinessObjects Enterprise tracks report instances that trigger alerts.

Alerts are custom messages created by Crystal Reports that provide more information about the report data, or prompt you to perform an action . When you view a report, alerts appear when certain conditions are met by report data.

To view alerts in Crystal reports

1. In InfoView, go to the folder/category that contains the Crystal report that you want to view.
2. Select the object and choose **Alerts** from the **Actions** menu in the InfoView Workspace toolbar.

   The "Alerts" dialog box appears.



Note:
You can access alerts only for reports that contain alerts. The "Alerts" dialog box displays only the instances that triggered the alert.

3. Double-click the title to launch the report instance in a Crystal report viewer.

Parameters

Some Crystal reports have parameters that you can modify to perform analysis on the data. You may be prompted to enter information when you refresh a report or view it on demand. The report designer determines how the parameters affect the report, including the option that allows you to change or reformat the data.

While you view a report, you can also edit parameters from the Parameter Panel in the Crystal reports *Web viewer* on page 43. Whether you view or edit a parameter is determined by the report designer. Some parameters may require you to exit the report and view it again to change their values. Java and ActiveX viewers prompt you to edit parameters if the report requires that you enter values before the report loads. You can edit these parameter values by refreshing the report.

Parameters may need new data from the database when you edit them. These are data parameters. Editing them increases the load on your system's servers. Data parameters are indicated by an icon ( ) in the Parameter Panel. Non-data parameters do not require new data when you edit them, are not flagged with an icon.

Crystal Reports supports optional parameters. If a report designer sets a specific parameter as optional, you are not required to fill it in to run the report. Instead, all possible data with will be displayed.

Example:

A report may contain an order date parameter. You enter a range of dates as the parameter value, and the report only displays data about orders within the time range you specified. If the report designer makes the order date parameter optional, you can enter a time range or leave the parameter blank to view all orders, regardless of their order date. Report designers should indicate that the parameter is optional in the prompt text.

When you schedule a report, each parameter's default value determines how data is displayed in the resulting instance. Default values are also used to display reports if users are not prompted to enter a value for that parameter when refreshing the report. If the report is set to prompt users to change parameter values when the report loads, or if no default value exists, users are prompted for a parameter value.

To view and edit the parameters of Crystal reports in the Web viewer

1. Navigate to the folder/category that contains the Crystal report that you want to view and double-click on its title to open it.
2. If you are asked to enter prompt values, you must fill in the report parameters before you can view the report. Select the data you would like to view and click **OK**.

   If you are not prompted to enter values for the parameters, you don't need to fill in any parameters and you are taken directly to the report.

   The report appears.
3. To view the parameters that you can access from within the report, click **Parameters** in the Crystal Reports viewer toolbar.
4. View the parameters in the Parameter Panel.
5. Click on a parameter to select it.
6. Edit the parameter value in one of the following ways:
   - Edit the parameter directly in the parameter panel by entering a new value.
   -  Click **Edit** to open an advanced editing dialog box and enter the new values according to the instructions. Then click **OK**.
7. Click **OK**.
8. Edit additional parameters if you wish.

   To view the report with your new parameter values, click **Apply**.

Distributing reports

You can distribute Crystal reports in two ways:

- Print a report
- Export a report

Note:

- You can also send Crystal reports to locations including files, email addresses, and BusinessObjects Enterprise Inboxes. For more information, see *Sending objects or instances* on page 101.
- If you have the rights to schedule reports, you can also distribute reports by scheduling them directly to a disk location, an email, FTP, or a printer. For details, see *Destination locations* on page 85.

Printing reports

You can print successful instances of reports or reports that you view on demand.

Note:

- Depending on the Crystal report viewer that you use, the steps detailed in this section may be different; however, the general principles for printing reports remain the same.
- If onscreen instructions are provided, follow those instructions instead of the steps that are described in this section.
- Page orientation is set by report designers when they create reports.

To print Crystal reports

1. Open the document that you want to view.
2.  On the viewer toolbar, click **Print Report**.

   The "Print" dialog box appears.
3. In the **Print range** area, select all pages or type a specific range of pages.
4. In the **Copies** area, select the number of copies that you want to print.

   Tip:
   If you select the "Collate" option, the pages are printed in numerical order. (For example, if you are printing two copies of a report that has four pages, your report prints pages one, two, three, and four of the first copy; and then prints pages one, two, three, and four of the second copy.)
5. Click **OK**.

Exporting reports

You can export successful instances of Crystal reports, as well as the reports that you view on demand, to several formats to reach a wider audience.

Example:

You can export data that predicts sales trends to an Excel spreadsheet and then email it to the sales team.

Tip:

- You can select the page range for the report that you want to export.
- For reports you can drill down into, export the drilled-down view.

Format types

BusinessObjects Enterprise provides you with several file format exporting options:

- Crystal Reports (.rpt)
- Adobe Portable Document Format (.pdf)
- Microsoft Excel (1997-2003) (.xls)
- Microsoft Excel (1997-2003) (.xls) data-only version
- Microsoft Word (1997-2003) (.doc)
- Microsoft Word (1997-2003) (.doc)—editable
- Rich Text Format (.rtf)
- Separated Values (CSV)
- Extensible Markup Language (.xml)

Note:

- When you export a report to a file format other than Crystal Reports (.rpt), you may lose some or all of the formatting. However, the program attempts to preserve as much formatting as the export format allows.
- The difference between Excel and Excel (data only) is that Excel attempts to preserve the look and feel of your original report.
- The Microsoft Word (1997-2003) format maintains as much formatting as possible, including graphics. Each object appears in an individual text field. Microsoft Word (1997-2003)—editable format does not preserve as

much formatting; text is displayed in lines and images are placed in line with the text. Rich text format is similar to Microsoft Word (1997-2003).
- Separated Values (CSV) format is only available from the Web viewer.
- You cannot export to Crystal Reports (RPT) format from a drilled-down view.
- Flash objects only appear if you export to Crystal reports or PDF formats. Fallback images appear when exporting to all other formats.

For more information about the options you must set to schedule a Crystal report to a specific format, please see *Additional formatting options for Crystal reports* on page 77 and the section on Exporting in the *Crystal Reports User's Guide*.

To export Crystal reports

1. Open the Crystal Reports document that you want to view.
2.  On the viewer toolbar, click **Export Report**.

   The "Export" dialog box appears.
3. In the **Page Range** area, select all pages or type a specific range of pages.
4. Click **Export**.

Interactive Sorting

Interactive sorting is a Crystal Reports feature that, when enabled by the report designer, allows you to sort data in a report as you view it. Because interactive sorting does not require any new data from the database, you can use it even if you do not have access to the database where the report originates.

You can tell that a report has interactive sorting enabled if you can see the interactive sorting controls for the fields by which you can sort:

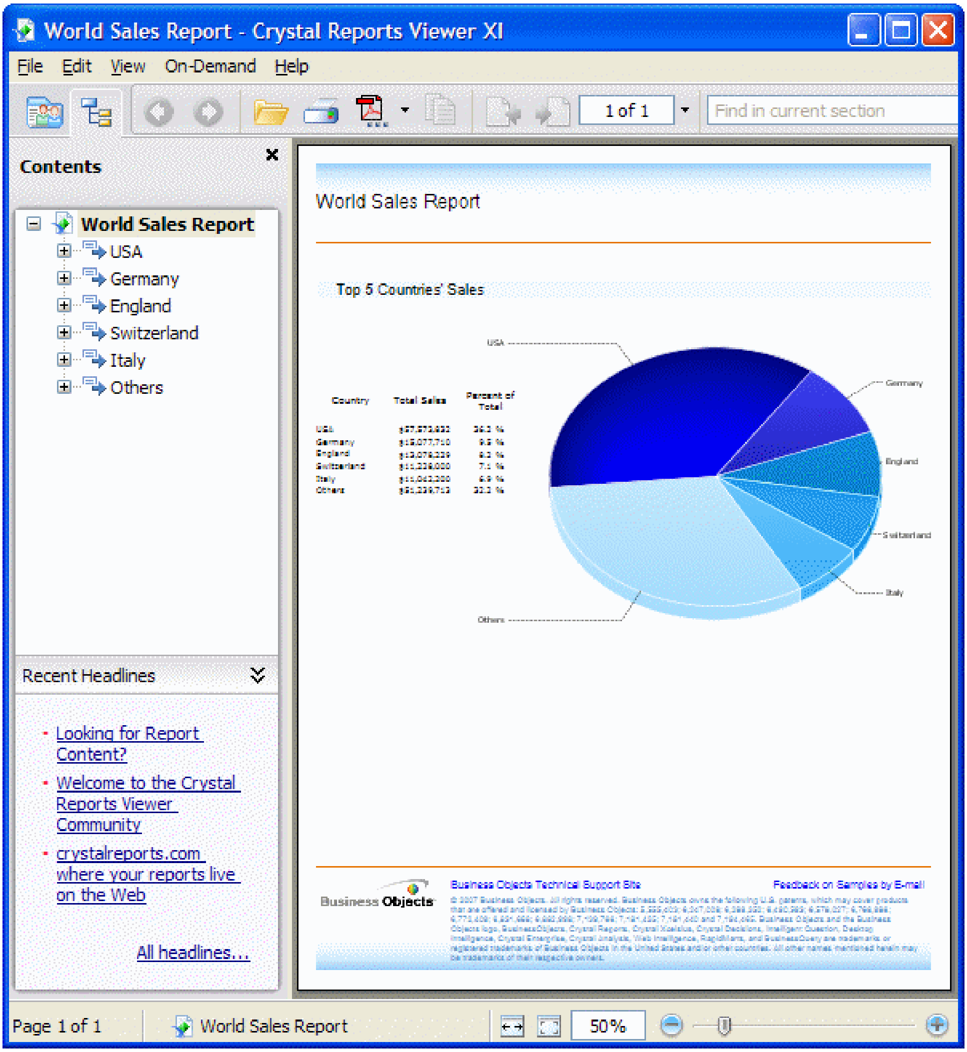
You can sort data alphabetically (if the data is in the form of a text string, such as the name of a country) or numerically, in either ascending or descending order.

To sort data interactively

1. Open a Crystal report that uses interactive sorting.
2. Choose a value to sort by.
3. Click the appropriate arrow to sort the data in the report according to your needs:
   - To create a list of data sorted in ascending order, click
   - To create a list of data sorted in descending order, click

Crystal Reports Viewer

Crystal Reports Viewer is installed locally on your computer. This means you can view any of your downloaded Crystal reports without connecting to the BusinessObjects Enterprise system.



Crystal Reports Viewer allows you to do the following tasks:

- Print or export your reports
- Save your reports
- Select data that you want to view
- Drill down into the report for more details
- View multiple reports

Crystal Reports Viewer functions the same way as Crystal Reports does. For more information about tasks that you can perform with the Crystal Reports Viewer, access the Crystal Reports Viewer online Help menu.

Installing the Crystal Reports Viewer

You can download the Crystal Reports Viewer from the Business Objects website at *http://www.businessobjects.com*. The viewer is available on the Crystal Reports section of the website. Once the viewer is installed, it resides locally as a client-side viewer.

To install the Crystal Reports Viewer

1. Download the Crystal Reports Viewer installation program from the Crystal Reports section of the Business Objects website at *http://www.businessobjects.com*.
2. Run the installation program.
3. Follow the onscreen instructions and accept the default values when possible.
4. When the installation is done, click **Finish**.

Launching the Crystal Reports Viewer

Crystal Reports Viewer launches when you select a Crystal report (.rpt) file from your machine and double-click it.

Note:
If Crystal Reports is installed on your computer, it takes precedence over the Crystal Reports Viewer and displays your reports by default.

Working with Web Intelligence Documents

chapter 9

Overview

When you work with Web Intelligence documents, you can use all of the InfoView features that are described in *Working with Objects* on page 51.

This section describes additional features that are unique to working with Web Intelligence documents, such as drilling, responding to prompts, and editing queries.

Viewing Web Intelligence documents

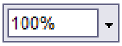
When you open a Web Intelligence document, the document appears in a viewer. Depending on the type of viewer that is deployed and the functions that are enabled by your BusinessObjects Enterprise administrator, you can perform a number of different activities. The following sections provide information about the Web Intelligence toolbar and give instructions on how to work with the navigation map, display user prompts, find text, and drill down data in your Web Intelligence documents.

For detailed instructions on how to perform analysis on Web Intelligence documents, see the *Performing On-Report Analysis with Web Intelligence* guide.

Web Intelligence toolbar

Option	Description
Document	**Document Actions** Allows you to edit or save the document.

Option	Description
	The **View** menu lets you choose the way the Desktop Intelligence viewer displays the document. **Quick Display Mode** displays the document in the default view. **Page Mode** displays the document in a paginated view. **Draft Mode** displays the document in a non-paginated view. **PDF** displays a PDF of the document. Your BusinessObjects Enterprise administrator determines whether the PDF is created of the entire document, or of the tab you are currently viewing.
	**Save** Saves the document.
	**Export to PDF for printing** Creates a PDF version of the document so that you can print it.
	**Find** Allows you to search for text in the document.
	**Undo** Reverses the previous action.
	**Redo** Reverses the undo action.

Option	Description
	**Zoom** Allows you to zoom in or out on the document.
	**Navigation** Allows you to move through the pages of a document. Go to Page, Go to Next Page, Go to Previous Page, Go to First Page, and Go to Last Page are the available options.
Edit	Allows you to edit the Web Intelligence document with your chosen Report Panel. **Note:** If you are using the Interactive viewer, you can edit document directly from the viewer, which also functions as a Report Panel.
	**Refresh Data** Obtains the most up-to-date data from the document's data source. You must have the necessary rights, and the document must contain the necessary data source information before you can refresh the document.
	**Start/End Drill mode** Allows you to drill to data beneath charts.
	**Snapshot** Takes a picture of the screen during Drill mode. The picture is saved on a tab for you to view at a later time.

Note:
If you are using the Interactive viewer, you will notice that you have more actions listed in your toolbar than are covered here. These actions are used to edit the Web Intelligence document. For more information about editing Web Intelligence documents, click **Help** in the Web Intelligence viewer.

Displaying the navigation map

The navigation map allows you to navigate to the reports that are contained in your Web Intelligence document.

To display the navigation map

1. Open the document that you want to view.
2. 

Click **View** and select **Left panel**.
3.  From the left panel list, select **Navigation Map**.

Displaying user prompts

Prompts gather information from users. For Web Intelligence documents, this information may determine what data appears in the document. For example, in a document that is used by sales, there may be a prompt that asks the user to choose a region. When the user chooses a region, the document displays the results for that specific region instead of displaying the results for all of the regions in the document.

To display user prompts

1. Open the document that you want to view.
2. 

Click **View** and select **Left panel**.
3.  From the left panel list, select **User Prompt Input**.

Finding text in documents

You can search for text in your documents.

To find text

1. Open the document that you want to view.
2. 

Click **View**, and select **Left panel**.
3.  Click **Find**.

   The Find options appear in the left panel.
4. In the **Find** field, type the text you want to locate.
5. Select **Match whole word** and/or **Match case**.
6. Select the direction of the search: **Up** or **Down**.
7. Click **Find Next**.

Drilling documents

You can drill down on document data to show the data beneath charts and summarized groups.

To drill document data

1. Open the document that you want to view.
2.  Click **Start Drill mode**, and then click links in the document to drill down to more information.
3.  Click **Add Drill Filter**.

   Filter options appear in a list.
4. Select a filter to apply to your drill session.
5.  Click **Snapshot** to take a picture of the drilled view.

The snapshot is saved as a tab in the viewer.

6. Click the tab to view the snapshot.
7.  Click **End Drill mode** to end the drill session.

Creating Web Intelligence documents

You can create Web Intelligence documents by selecting a universe in InfoView and building one or more queries to define the data content of the documents. Each universe maps to a database that contains business information. When you connect to a universe, Web Intelligence automatically launches the document editor that is selected in your Web Intelligence preferences in InfoView. For more information about the Web Intelligence preferences, see *Setting Preferences* on page 29.

Selecting a universe for a new document

To select a universe for a new document

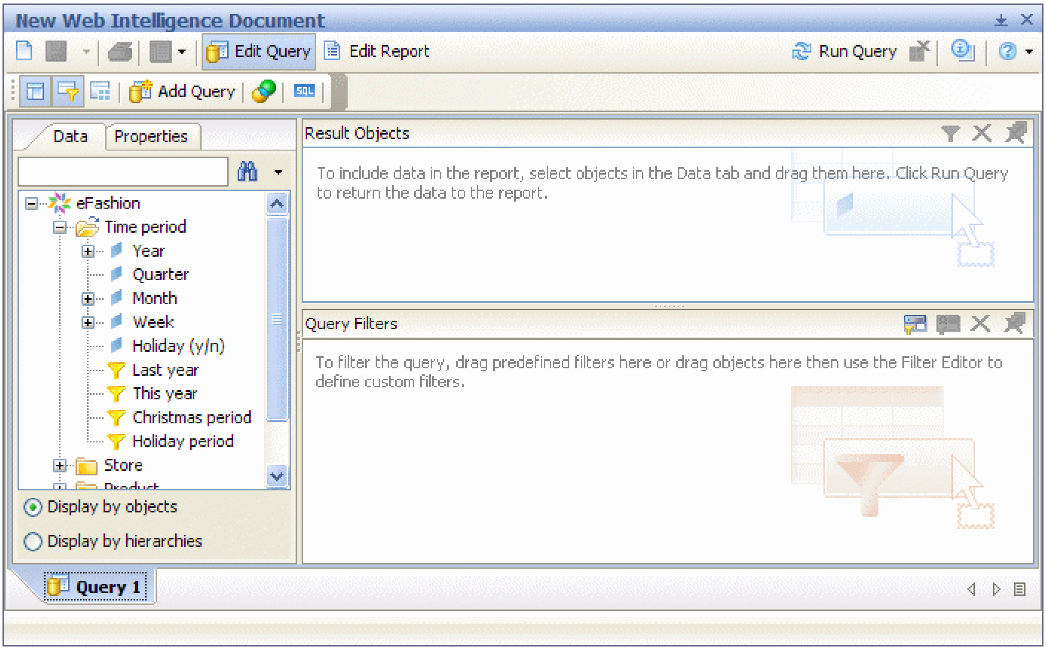
1. In InfoView, click **New**, and select **Web Intelligence Document**.

   The "Web Intelligence Document—New Document" page appears.

2. Click the universe that you want to use as the data source for your document.

   Note:
   You can specify a default universe for Web Intelligence to use when you create a Web Intelligence document.

   The "Web Intelligence report panel" opens.



3. Build one or more queries to use in your document.

   Note:
   For instructions on how to use the report panel to build queries for Web Intelligence documents, refer to the appropriate guide for the report panel you are using:
   - *Building reports using the Web Intelligence HTML Report Panel*
   - *Building queries with Web Intelligence Query-HTML*
   - *Building reports using the Java Report Panel*

4. 

   Click **Run Query**.

Related Topics

- *Selecting a default universe* on page 36

Editing queries in existing documents

You can edit the queries on which your Web Intelligence documents are based. By editing the queries, you can modify the data definitions of your documents to match changes in your corporate data and business needs.

To edit queries while viewing documents

1. Open the document that you want to view.
2.  Click **Document**, and then select **Edit**.

   The report appears and displays the queries that are defined for the document.

For instructions on how to use the report panel to build queries for Web Intelligence documents, refer to the appropriate guide for the report panel you are using:

- *Building reports using the Web Intelligence HTML Report Panel*
- *Building queries with Web Intelligence Query-HTML*
- *Building reports using the Java Report Panel*

Data tracking

For more information about data tracking, see the *Web Intelligence User's Guide*.

Tracking changes in your data

To make informed and effective business intelligence decisions, you need to understand how the data on which you base those decisions changes over time. Web Intelligence allows you to track and display data changes to help you focus your analysis on key areas and avoid wasting time exploring irrelevant data.

When you track data changes, you select a particular data refresh as a reference point. This data is known as the reference data. When you display the data changes, Web Intelligence places your current data in context by showing how it relates to the reference data.

Here are some examples of the usefulness of data tracking:

- If an outlet no longer appears in a list of the top outlets by sales, Web Intelligence displays the outlet as deleted from the list. You can use this information to investigate why the outlet is no longer a top performer.
- If sales have decreased in a region, data tracking displays the decrease. You can then drill down into the data for the region to understand why revenue is falling.

  In both these cases, data tracking makes the current data more meaningful by placing it in context with old data. Without this context it is much more difficult to identify trends.

Working with Voyager Workspaces

10

chapter

Overview

Voyager is a designer that allows you to create workspaces and open workspaces created by others to analyze OLAP data. If you have a connection to a BusinessObjects Enterprise system that has Voyager installed, you can create, view, and manage Voyager workspaces from your web browser; you do not need to install any applications on your local computer.

To create Voyager workspaces in InfoView, your administrator must first define a connection to an OLAP data source and you must have the appropriate rights to that connection. Contact your administrator to find out if a connection exists and if you have the necessary rights to it.

You can use Voyager to create a workspace and analyze your data from within InfoView.

For more information about the features of Voyager, see the *BusinessObjects Voyager User's Guide*, which is available in the `docs` directory of the product distribution.

Terminology

Term	Definition
member	A data set that can become a row or column of a crosstab or a part of a chart.
measure	A measure is a member that is an aggregated numeric value; for example, total sales, number of stores, or number of customers.
dimension	A collection of related data members. The members can be organized in a hierarchical structure (for example in a Geography dimension) or a flat structure (for example in a Measures dimension). Dimensions can be nested so that a crosstab or chart can display more information, making it easier to compare. Nesting dimensions means placing two or more dimensions on the same axis. For example, you may want to view data for different sizes of stores, in different cities, against the products the stores sell. You could nest the Stores and Cities dimensions on one axis. For more information, see the *BusinessObjects Voyager User's Guide*.
OLAP	Online Analytical Processing (OLAP) applications are designed from the start with online data analysis in mind. To reduce processing time to the minimum, database data is summarized and pre-consolidated into matrix table format. Because these tables usually have three (or more) dimensions, they are referred to as data "cubes". If a relational database can read about 200 records per second and write 20, a good OLAP server, using row and column arithmetic, can consolidate 20,000 to 30,000 cells (equivalent to relational records) a second. This, the much smaller storage space OLAP data requires, and faster access due to more efficient indexing, are the keys to OLAP reporting speed, which is two or three orders of magnitude faster than relational technology

Term	Definition
axis	Any of the three spatial axes on a Voyager crosstab or chart component. For example, a Voyager crosstab appears as a two-dimensional table, similar to an Excel spreadsheet. The crosstab has two “view” axes, similar to Excel's vertical and horizontal axes. The two view axes are called the row axis and column axis. In addition, by visualizing the two-dimensional object as being a “slice” of a three-dimensional object, and allowing the position of the slice to change, you can think of a third axis as being perpendicular to the screen. This is the slice axis. Therefore, a Voyager crosstab axis is any one of those three spatial axes.

Creating Voyager workspaces

To create a Voyager workspace

1. Log on to InfoView and view the **Document List**.
2. On the InfoView Workspace panel toolbar, click **New**, and then select **Voyager Workspace**.

   A workspace is created for you, containing an empty crosstab and an undefined query. The Choose Connection dialog box is also displayed.

   Note:
   If your system administrator has not created any OLAP data connections, “Voyager Workspace” does not appear in the New menu. Your administrator must create data connections before you can start Voyager.
3. Click a connection in the list, and then click **OK** to add it to your workspace.

   Alternatively, you can double-click the desired connection to add it to your workspace.

Note:
Voyager includes a set of sample cubes that you can use to explore the many analysis features Voyager provides. Your system administrator can install these sample cubes and create connections for them so that you can add them to your workspaces. For more information, see "Installing sample data cubes" in the *BusinessObjects Voyager Administrator's Guide*.

4. If the connection requires authentication, type your credentials in the **Logon** dialog box and click **OK**.

   If authentication succeeds, the connection appears in the active connections list at the top of the Data tab, and the metadata explorer displays the data objects contained in the data source.

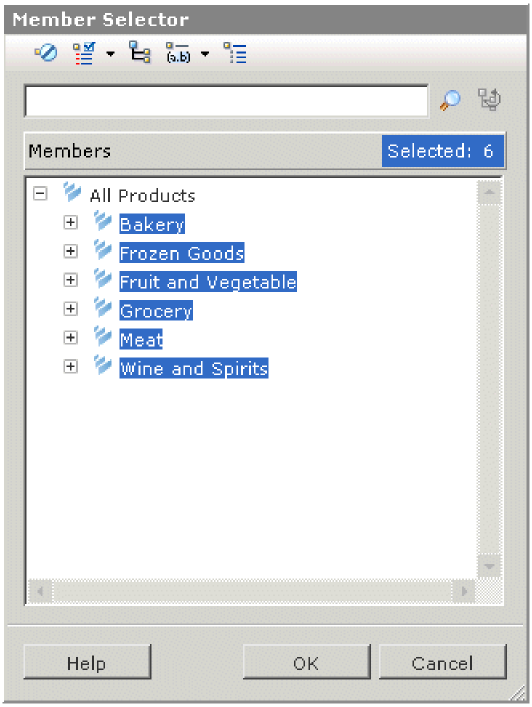
   If authentication fails, contact your system administrator. Your credentials may not be set up properly in the Central Management Console, or the OLAP server may be offline.

   For more information about creating Voyager workspaces, refer to the *BusinessObjects Voyager User's Guide*.

Overview of member selection

You can use the Member Selector or the metadata explorer to choose the members to be displayed in your crosstabs and charts. The Member Selector includes features that let you search for members, aggregate search results, select members by level, and select parent, child, and sibling members. The metadata explorer provides only basic manual selection of members.

The rest of this section describes selecting members using the Member Selector. For more information about the metadata explorer, see the section on the data tab metadata explorer in the *BusinessObjects Voyager User's Guide*.



 When you place a dimension on any of the three axes on chart and crosstab components, a Member Selector button is shown beside the dimension name. The Member Selector helps you choose members of the dimensions you place on those axes.

 Additionally, a measures Member Selector in the component's title bar lets you select members of the measures dimension whether or not you have explicitly added the measures dimension to one of the three axes. If you add only fact dimensions to the axes, the crosstab is still populated with data; Voyager automatically selects the default member of the measures dimension and uses that member's data to populate the crosstab. At all times, the measures used to populate the crosstab with data are shown in the crosstab's title bar, and you can use the measures Member Selector to select measures for the crosstab.

You can select members in several ways:

- Select individual members from the list of all members in the dimension.

For details, see *Selecting individual members from a list of all members* on page 165.

- Search for members.

  For details, see *Selecting members by searching* on page 167.

- Select all members at the same level in the dimension.

  For details, see *Selecting all members at a particular level in the dimension* on page 169.

- Select parent, child, or sibling members.

  For details, see *Selecting parent, child, or sibling members* on page 170.

Related Topics

- *Hiding members from view* on page 170

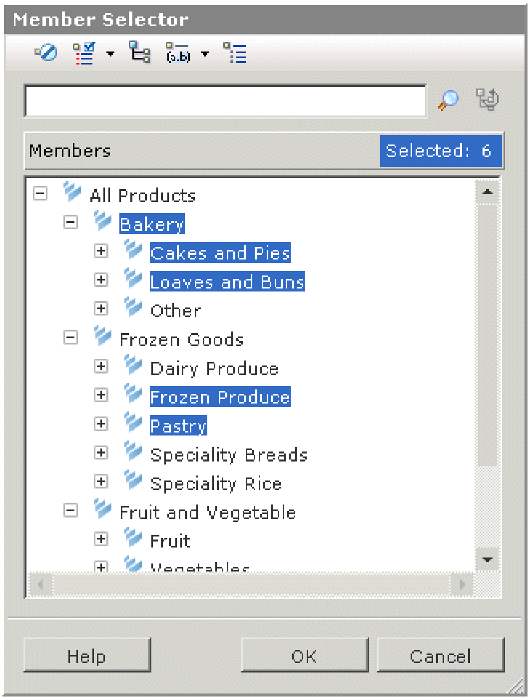
Selecting individual members from a list of all members

If you want to select a small number of members, not according to any pattern or parameters, you can select individual members in the Member Selector.

To select individual members

1.  Click the **Member Selector** button beside a dimension name to open the Member Selector.

   The member list is automatically expanded to display all members that are currently displayed for that dimension.



2. Choose the members you want to see in your view.
   - Click a member to select it; click the member again to deselect it.
   - To select or deselect a range of members, hold down the **Shift** key as you click members.
   - You do not need to hold down the **Ctrl** key to select multiple individual members.
3. Click **OK** to update the crosstab or chart.

   Note:
   If you deselect all members, the OK button in the Member Selector is disabled because you must select at least one member for each dimension on the crosstab.

Selecting members by searching

Using the search capabilities of the Member Selector, you can search for members by specifying member names or captions.

Because selections from multiple search results are cumulative, you can use multiple searches to build the set of members you want to analyze.

For example, if you wanted to analyze sales of books and magazines, you would perform these steps:

- Perform a search for "book" in the Member Selector.
- Select appropriate members from the search results.
- Without closing the Member Selector, perform a second search for "magazine."
- Select members from the second search results.

When you click OK, all selected members from both searches are displayed.

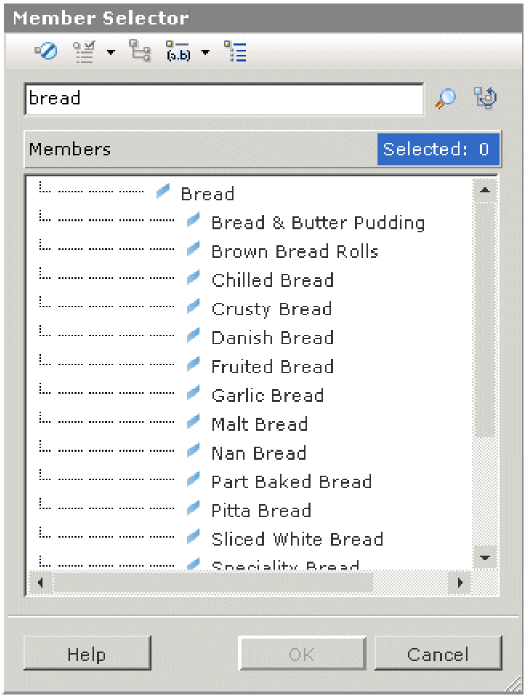
For more information about searching for members in the Member Selector, including tips on search-string syntax and using wildcards, see the section on displaying member names and captions, as well as the section on the Member Selector Start Search button in the *BusinessObjects Voyager User's Guide*.

To search for member names or captions

1. Click the **Member Selector** button beside the dimension name to open the Member Selector.
2. In the Member Selector, click **Display Mode** to choose which member text to search.

   If you want to search by member names only, select **Name**. If you want to search by member captions only, select **Caption**. If you want to search by both member names and captions, select either **Name : Caption** or **Caption : Name**.
3. Type a search string in the text box at the top of the Member Selector.
4. Click **Search** or press **Enter**.

   Members that match the search string are displayed in a hierarchical list.



Also, any members that were already included in the query are highlighted in the search results.

5. Select any members that you want to include in the query.
   - Click a member to select it; click the member again to deselect it.
   - To select or deselect a range of members, hold down the **Shift** key as you click members.
   - You do not need to hold down the **Ctrl** key to select multiple individual members.
6. If you want to perform additional searches to select more members, repeat steps 3 to 5.
7. Click **OK**.

Note:

 Clicking the Return to Member List button returns you to the complete member list. All selected members remain selected.

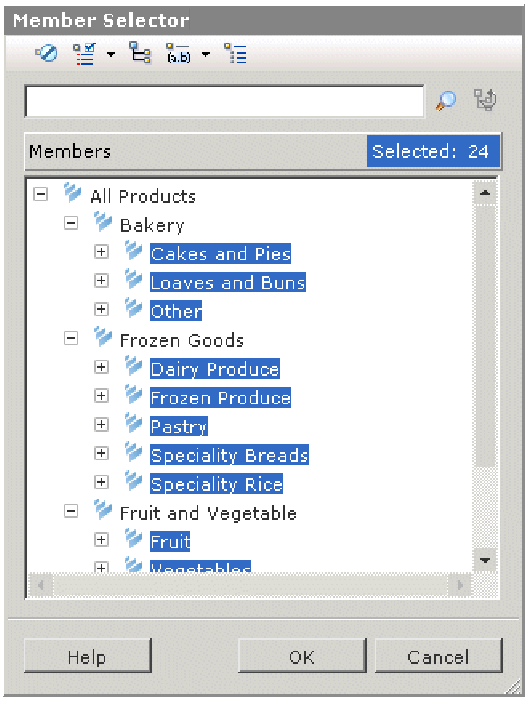
Selecting all members at a particular level in the dimension

You may want to select all members at the same level in the dimension. If the number of members in the dimension is large, it may be faster to use the Select Level button in the Member Selector toolbar.

To select all members at a level

1. Click the **Member Selector** button beside the dimension name to open the Member Selector.
2. Click **Select Level** on the Member Selector toolbar.
3. Select a level from the list.

   All members at that level in the dimension are selected.



Alternatively, you can right-click a member, point to **Select**, and choose **All at this level** to select all members at that level in the dimension.

Selecting parent, child, or sibling members

After you've selected one or more members in the Member Selector, you may want to select the parent of a member, or the children or siblings of a member.

For example, for the member Quarter 2, its parent member could be 2007, its child members could be April, May, and June, and its sibling members could be Quarter 1, Quarter 3, and Quarter 4.

To select parent, child, or sibling members

1.  Click the **Member Selector** button beside the dimension name to open the Member Selector.
2. Right-click a member in the Member Selector, point to **Select**, and choose **Parent**, **Children**, or **Siblings**.

Hiding members from view

You can hide members from the crosstab or chart in two ways:

- Deselect the members in the Member Selector.
- Select one or more members in the crosstab or chart, right-click one of the selected members, and select Hide Member.

  To select multiple individual members, hold down the **Ctrl** key while selecting members. To select a range of members, select one end point of the range, hold down the **Shift** key, and then select the second end point.

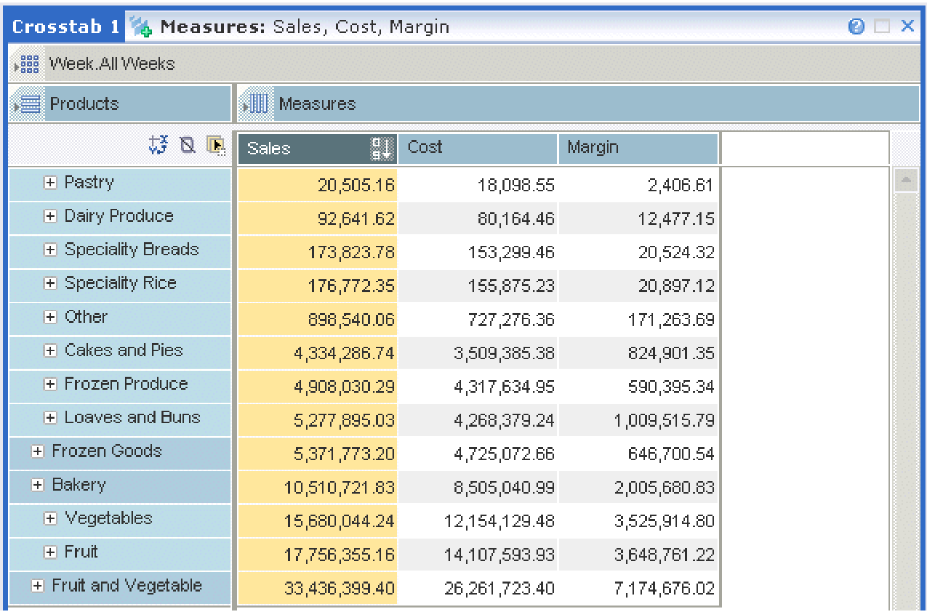
The two methods are equivalent. If you want to restore a hidden member to the crosstab or chart, use the Member Selector to re-select the hidden member.

Sorting data columns or rows

Voyager provides these options for sorting rows and columns in the crosstab:

- Ascending
- Descending
- Maintain Hierarchies
- Clear

An ascending sort orders your data with the smaller data at the top or to the left. A descending sort orders your data with larger data at the top or to the left. By default, data is sorted without regard to the hierarchical structure of the dimension. For more information about sorting within hierarchical structures, see the *BusinessObjects Voyager User's Guide*.



Products	Sales	Cost	Margin
Pastry	20,505.16	18,098.55	2,406.61
Dairy Produce	92,641.62	80,164.46	12,477.15
Speciality Breads	173,823.78	153,299.46	20,524.32
Speciality Rice	176,772.35	155,875.23	20,897.12
Other	898,540.06	727,276.36	171,263.69
Cakes and Pies	4,334,286.74	3,509,385.38	824,901.35
Frozen Produce	4,908,030.29	4,317,634.95	590,395.34
Loaves and Buns	5,277,895.03	4,268,379.24	1,009,515.79
Frozen Goods	5,371,773.20	4,725,072.66	646,700.54
Bakery	10,510,721.83	8,505,040.99	2,005,680.83
Vegetables	15,680,044.24	12,154,129.48	3,525,914.80
Fruit	17,756,355.16	14,107,593.93	3,648,761.22
Fruit and Vegetable	33,436,399.40	26,261,723.40	7,174,676.02

You can add a sort to one column member and one row member. On an axis that has nested dimensions, the selected member must be on the innermost dimension.

Cells that are uninitialized (null) or invalid are ranked in value below any other cells; they appear last in a descending and first in an ascending sort. They are shown as nulls in the crosstab.

To sort data columns or rows in ascending order

1. In the crosstab, select the row or column member heading that you want to sort.
2.  Click **Sort**.

   Alternatively, you can click the arrow beside the Sort button and click Ascending, or right-click the member heading, point to Sort, and then select Ascending.

   An icon appears beside the member name, indicating the direction of the sort.

To sort data columns or rows in descending order

1. In the crosstab, select the row or column member heading that you want to sort.
2.  Click the arrow beside the **Sort** button, and then click **Descending**.

   Alternatively, right-click the member heading, point to Sort, and then select Descending.

   An icon appears beside the member name, indicating the direction of the sort.

To reverse the sort direction

-  In the crosstab, click the sort icon beside the member name.

  The icon changes to reflect the new sort direction.

  Note:

  - The sort button is disabled until you select a single row or column in a crosstab.
  - If your crosstab contains nested dimensions, you can add a sort only to a member of the innermost dimension.

For more information about sorting and the different sort types, see "Sort button".

Related Topics

- *Combining a sort and filter* on page 181
- *Combining a sort and rank* on page 181

Removing a sort

To manually remove a sort

1. In the crosstab, select the row or column member heading that you want to remove a sort from.
2.  Click the arrow beside the **Sort** button, and then click **Clear**.

    Alternatively, you can right-click the member heading, point to Sort, and then click Clear, or right-click the Sort icon beside the sorted member's name and click Clear Sort.

   Note:
   If the crosstab contains a sort on the other axis, that sort remains in effect.

Filtering the data in crosstabs and charts

You can filter data so that only the data that you're interested in is included in your crosstabs and charts. To filter out data, you apply a condition to one or more rows or columns in the crosstab. If a cell value does not satisfy the filter condition, its entire row or column is removed from the crosstab.

A filter is applied to one or more row members, or one or more column members, but not to both row and column members simultaneously. On an axis that has nested dimensions, the selected members must be on the innermost dimension.

Filtering is performed on the original, unformatted values of cells. This behavior can lead to apparent small discrepancies in excluding or including cells. For example, a value displayed as 100.00 would be excluded after a filter has been applied excluding only numbers greater than 100, if its original value were 100.005.

For more information about filters, see the *BusinessObjects Voyager User's Guide*.

To apply a new filter

1. In the crosstab, select the row or column member headings that you want to apply the filter to.
2.  Click **Filter**.

   Alternatively, right-click any of the selected member headings, point to Filter, and then click Set.
3. In the Filter Editor dialog box, select the type of filter you want to add to the selected rows or columns.

   For details on the types of filters you can apply, see "Filter Editor dialog box".
4. Choose a condition and type values for your filter.

   For example, if you are applying a "greater than" filter, enter the minimum number that you want to be included in that row or column.
5. Click **OK**.

   The target rows or columns are filtered, and a Filter icon appears beside the member names.

Adding a second filter

When you add a second filter to a different member on the same crosstab axis, the second filter is applied to the results of the first filter. Both filters are in effect, and the crosstab displays only the rows or columns that satisfy both filter conditions.

To modify an existing filter

1. In the crosstab, select the row or column member heading that you want to modify a filter for.
2.  Click **Filter**.

   Alternatively, right-click the member heading, point to Filter, and click Set, or click the Filter icon beside the filtered member's name.

   The Filter Editor dialog box opens, showing the existing filter's condition and values.
3. Make the desired changes to the filter and click **OK**.

   Note:

   - The filter button is disabled until you select a single row or column in a crosstab.
   - If your crosstab contains nested dimensions, you can add a filter only to a member of the innermost dimension.

Related Topics

- *Combining a filter and rank* on page 182
- *Combining a sort and filter* on page 181

Removing a filter

You can manually remove a filter, or Voyager can remove filters automatically. Whenever you swap, replace, or nest dimensions on the row or column axes, all filters are automatically removed from the query. However, filters are not automatically removed if you perform a "swap axis" operation.

Related Topics

- *Automatically removed sorts, filters, and ranks* on page 176

To manually remove a filter

1. In the crosstab, right-click the row or column member heading that you want to remove a filter from.

2. Point to **Filter**, and then click **Clear**.

   Alternatively, you can right-click the Filter icon beside the filtered member's name and click Clear Filter.

   Only the target filter is removed. If the crosstab contains other filters, those remain in effect.

Automatically removed sorts, filters, and ranks

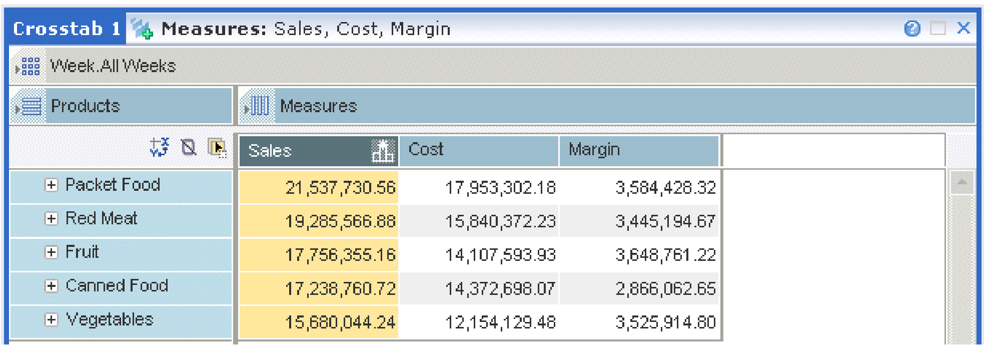
When any of the following actions is performed, all existing sorts, filters, and ranks that are applied to that axis (the "target" axis) are automatically removed:

- Swapping dimensions, removing a dimension, or adding a dimension.
- Changing the order of nested dimensions.
- Swapping a dimension to the slice axis.

Swapping the positions of the row and column dimensions with the Swap Axis button does not remove sorts, filters, or ranks from the query.

Ranking the data in the crosstab

A rank is a type of filter that selects cell values based on their contribution to an overall total. The selected cells are then sorted in ascending or descending order, depending on the rank condition.



For example, a data analyst may start with a crosstab that shows all product brands. She then performs a ranking action to see only the unit sales of the Top 20 product brands, sorted from highest to lowest unit sales.

A rank action is performed on a single column or row. On an axis that has nested dimensions, the selected member must be on the innermost dimension.

For more information about ranking, see *Rank button* on page 179 and *Rank Editor dialog box* on page 179.

To add a rank

1. In the crosstab, select the row or column member heading that you want to apply a rank to.
2.  Click **Rank**.

   Alternatively, right-click the member heading, point to Rank, and click Set.
3. From the Rank Editor dialog box, select a rank Condition, and then enter the Number of Members or the Percentage of Total.

   For details on the types of ranks you can apply, see *Rank Editor dialog box* on page 179.
4. Click **OK**.

   The target row or column is ranked, and a Rank icon appears beside the member name.

To modify an existing rank

1. In the crosstab, select the row or column member heading that you want to modify a rank for.
2.  Click **Rank**.

   Alternatively, right-click the member heading, point to Rank, and then click Set, or click the Rank icon beside the ranked member's name.

The Rank Editor dialog box opens, showing the values defined for the existing rank.

3. Make the desired changes to the rank and click **OK**.

   For details on the types of ranks you can apply, see *Rank Editor dialog box* on page 179.

   Note:

   - The Rank button is disabled until you select a single row or column in a crosstab.
   - The Clear option is disabled until you select a single row or column in a crosstab, that has a rank applied to it.

Related Topics

- *Combining a filter and rank* on page 182
- *Combining a sort and rank* on page 181

Adding a second rank

When you add a second rank to a different member on the same crosstab axis, the second rank is applied to the results of the first rank. Both ranks are in effect, and the crosstab displays only the rows or columns that satisfy both rank conditions.

For example, if you apply a "Top 20" rank to one member, and then apply a "Top 10" rank to another member on the same axis, the crosstab displays the top 10 members out of those 20 members.

Removing a rank

To manually remove a rank

1. In the crosstab, right-click the row or column member heading that you want to remove a rank from.
2. Point to **Rank**, and then click **Clear**.

 Alternatively, you can right-click the Rank icon beside the ranked member's name and click Clear Rank.

Only the target rank is removed. If the crosstab contains other ranks, those remain in effect.

Rank button

 Use this button to rank the data in the crosstab.

Click the Rank button to open the Rank Editor dialog box.

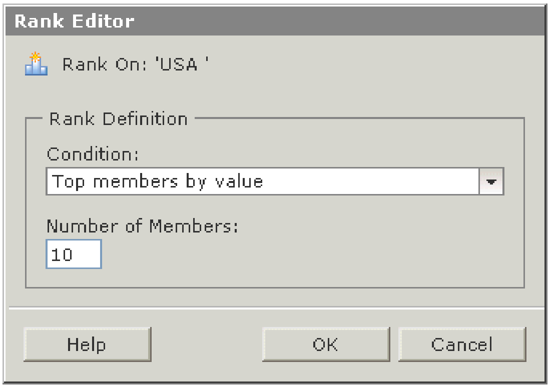
For more information about ranking and the different ranking types, see *Ranking the data in the crosstab* on page 176 and *Rank Editor dialog box* on page 179.

Note:
The Rank button is disabled until you select a single row or column in a crosstab.

When a member has a rank applied, the rank icon appears beside the member name:

Rank Editor dialog box

Use the Rank Editor dialog box to define the parameters of the rank you want to add to the crosstab.



You need to provide two parameters to define a rank: a condition and a value.

First you select one of the following conditions:

- Top members by value.
- Bottom members by value.
- Top contributors to % of total.
- Bottom contributors to % of total.

Then you enter either the Number of Members value or a percentage. The Number of Members value can be any integer between 1 and 2^31 (2.14E9).

The sort direction applied by the rank operation depends on the selected operator. If you choose a "Top members by value" or "Top contributors to % of total" rank, the rank also applies a descending sort. If you choose a "Bottom members by value" or "Bottom contributors to % of total" rank, the rank also applies an ascending sort.

Related Topics

- *Ranking the data in the crosstab* on page 176

Displaying sorts, filters, and ranks applied to the query

In addition to the sort, filter, and rank icons that are displayed in member headings, you can see a summary of all sorts, filters, and ranks that have been applied to any members on the crosstab, in a single list.

Click the Display Member Settings button in the crosstab's button area to open the list. In the Member Settings dialog box, you can review the conditions applied to your data, and remove any conditions you no longer want to apply.

For more information, see *Hidden sorts, filters, and ranks* on page 181.

Hidden sorts, filters, and ranks

If you apply a sort, filter, or rank condition to a member in a crosstab, and then that member is hidden, the sort, filter, or rank still applies. Members can become hidden if you perform a focused drill-down, if you manually hide or deselect members, or if you apply a second condition that excludes the first member.

If your data has hidden conditions applied, you can click the Display Member Settings button to view the list of conditions. Then, you can use the Member Selector to restore the hidden members to the crosstab if desired.

For more information, see *Displaying sorts, filters, and ranks applied to the query* on page 180.

Combining a sort and filter

When you apply both a sort and a filter to the same row or column, the returned data reflects both operations. The values are filtered, and ordered based on the sort operation. If you then remove either the sort or the filter, the remaining operation is reapplied to the query's entire data set.

Combining a sort and rank

When you apply both a sort and a rank to the same row or column, the returned data reflects both operations. The values are ranked, and ordered based on the explicit sort operation. If you then remove either the sort or the rank, the remaining operation is reapplied to the query's entire data set.

When you apply a sort and a rank to the same member, the explicitly applied sort always overrides the sort applied by the ranking operation.

Combining a filter and rank

When you apply both a filter and a rank to the same row or column, the returned data reflects both operations. If you then remove either the filter or the rank, the remaining operation is reapplied to the query's entire data set.

Drilling down and drilling up

Often you want to explore data in a hierarchical dimension more closely to find reasons for unexpected performance. In a crosstab or chart, you can expand a member to show its constituent child members. This is called drilling down.

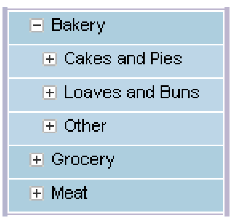
Collapsing the member structure to show only the parent member is called drilling up.

A plus sign next to a member indicates that the member can be drilled down to show its child members; a minus sign indicates that the member has been expanded-drilled down, and can be collapsed to hide its child members.

You can perform either expanded drill or focused drill operations on members.

Expanded drill

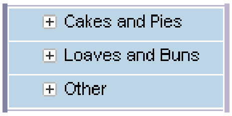
If you perform an expanded drill down on the member Bakery, you see Bakery and its child members, as well as any other members that are currently selected on the same view axis. For example, if Bakery, Grocery, and Meat are currently displayed on the row axis of your crosstab, applying an expanded drill down on Bakery to display its children does not remove Grocery and Meat from the row axis.



If you perform an expanded drill up on Bakery, the view returns to the state that existed before the expanded drill down.

Focused drill

If you perform a focused drill down on Bakery, you see only the child members of Bakery. Grocery and Meat are removed.



If you perform a focused drill up on one of the child members of Bakery, you see Bakery and its siblings.

To expand-drill down a level in a crosstab

- Click the plus sign next to the member name to display its child members:

  You can continue drilling down into lower levels as long as a plus sign appears beside the member name.

  Alternatively, you can right-click the member, point to Drill, and click Down.

To expand-drill up a level in a crosstab

- Click the minus sign next to the member name.

  The child members no longer appear in the view, and the minus sign changes to a plus sign.

  Alternatively, you can right-click the member, point to Drill, and click Up.

To expand-drill down a level in a chart

1. Right-click a member in the chart.

Depending on the type of chart, the member could be represented by a marker such as a pie slice or column chart riser, or by a name in the chart legend, or by a caption.

For definitions of data series and category members, see “Chart component reference” in the *BusinessObjects Voyager User's Guide*.

2. Select **Drill Down** to display the child members.

   You can continue drilling down into lower levels. When you have drilled down as far as your data allows, the Drill Down option is unavailable.

To expand-drill up a level in a chart

1. Right-click a member in the chart.

   Depending on the type of chart, the member could be represented by a marker such as a pie slice or column chart riser, or by a name in the chart legend, or by a caption.
2. Select **Drill Up** to display the parent member.

   The child members no longer appear in the view.

To focus-drill down a level in a crosstab

- Double-click the member you want to drill down.

  The child members replace their parent.

  Alternatively, you can right-click the member, point to Drill, and click Focused Down.

To focus-drill up a level in a crosstab

- Hold down **Shift** and double-click the member you want to drill up.

  The parent member and its siblings replace the child members.

  Alternatively, you can right-click the member, point to Drill, and click Focused Up.

To focus-drill down a level in a chart

- Double-click a member in the chart.

  Depending on the type of chart, the member could be represented by a marker such as a pie slice or column chart riser, or by a name in the chart legend, or by a caption.

  For definitions of data series and category members, see “Chart component reference” in the *BusinessObjects Voyager User's Guide*.

  You can continue drilling down into lower levels. When you have drilled down as far as your data allows, the Drill Down option is unavailable.

  Alternatively, you can right-click the chart object, and click Focused Drill Down.

To focus-drill up a level in a chart

- Hold down the **Shift** key, and double-click a member in the chart, to display the parent member:

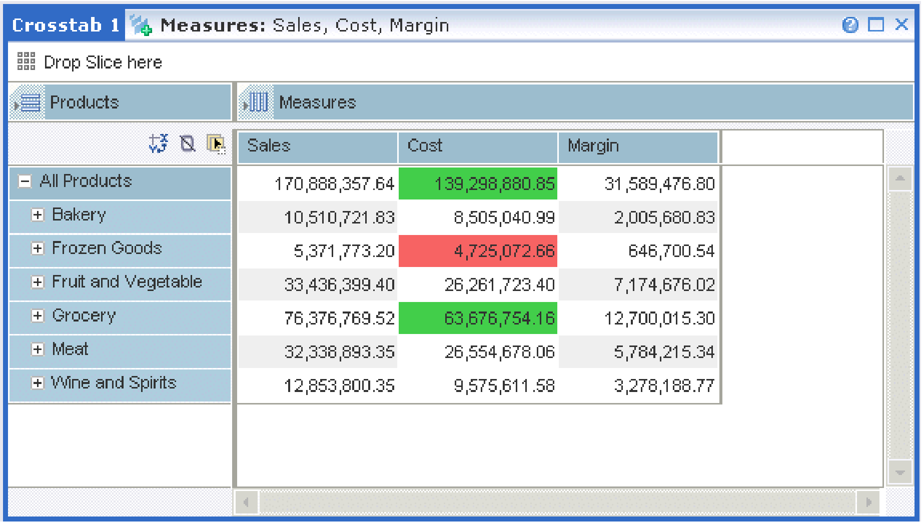
  Depending on the type of chart, the member could be represented by a marker such as a pie slice or column chart riser, or by a name in the chart legend, or by a caption.

  The child members no longer appear in the view.

  Alternatively, you can right-click the chart object, and click Focused Drill Up.

Overview of exception highlighting

You can apply color to the cells in a crosstab to highlight important differences or unexpected results. For example, you might want to highlight a value that is greater or less than a particular value.



Products	Sales	Cost	Margin
All Products	170,888,357.64	139,298,880.85	31,589,476.80
Bakery	10,510,721.83	8,505,040.99	2,005,680.83
Frozen Goods	5,371,773.20	4,725,072.66	646,700.54
Fruit and Vegetable	33,436,399.40	26,261,723.40	7,174,676.02
Grocery	76,376,769.52	63,676,754.16	12,700,015.30
Meat	32,338,893.35	26,554,678.06	5,784,215.34
Wine and Spirits	12,853,800.35	9,575,611.58	3,278,188.77

Exception highlighting can be performed globally on the entire crosstab, or on individual columns or rows. Exception highlighting settings are saved with the workspace.

Note:
On an axis that has nested dimensions, you can add row or column highlighting only to members of the innermost dimension.

Related Topics

- *Applying exception highlighting* on page 186
- *Removing exception highlighting* on page 187

Applying exception highlighting

You can apply exception highlighting to individual rows and columns of the crosstab, or to the entire crosstab.

- Row and column highlighting

  Row and column exception highlighting is used to distinguish values that are inside or outside given ranges, in selected columns or rows. For example, if you were analyzing sales figures and wanted to know which regions had sales lower than a certain value, you could apply exception highlighting to find those poorly performing regions.

- Global highlighting

  Global exception highlighting is used to distinguish values that are inside or outside given ranges, across the entire crosstab. For example, if you were analyzing sales figures across your entire organization, and wanted to know which stores, regardless of location or size, had sales higher than a certain value, you could apply global exception highlighting to find those top-performing stores.

You can manually define up to seven ranges in Voyager, by specifying end points for the ranges. When you enter a value in the Exception Highlighting dialog box, that value defines the starting point for a new range. The new range includes all values that are equal to or greater than the value you entered, and less than the next starting point.

Alternatively, you can use one of the predefined exception highlighting types (traffic light, shades of red, shades of green, shades of red and green, hot and cold) to automatically define some of the ranges for you.

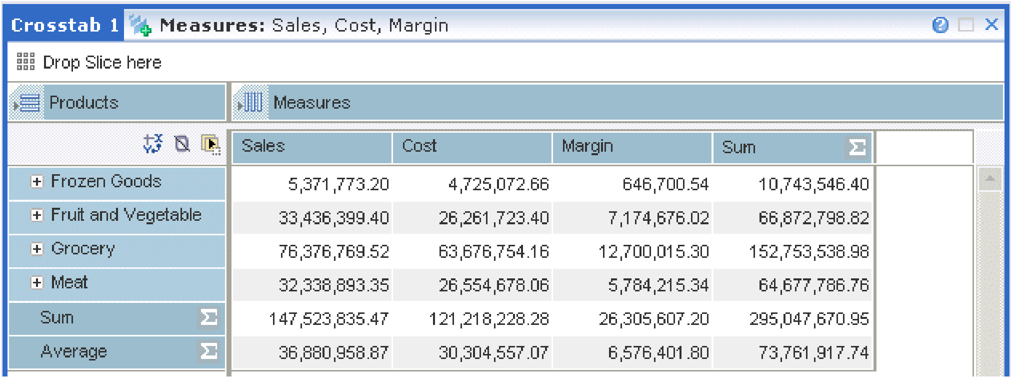
Removing exception highlighting

You can remove exception highlighting at any time, to restore your original view of the data.

Visual totals

Visual totals are dynamic aggregations of your data, such as sums or averages, displayed in rows or columns added to the crosstab. Visual totals aggregate the data in the crosstab without regard to members' relationships in the hierarchy. For example, if your crosstab displays the members Drink and Food, and also the child members Bread and Meat, the visual total aggregates the data for all four members despite Bread and Meat being child members of Food.

Visual totals appear at the bottom or at the right side of the crosstab but are not created as members like other calculations are. (For example, visual totals do not appear in the Member Selector.) They can be added and removed individually, or all turned on and off simultaneously.



	Sales	Cost	Margin	Sum
Frozen Goods	5,371,773.20	4,725,072.66	646,700.54	10,743,546.40
Fruit and Vegetable	33,436,399.40	26,261,723.40	7,174,676.02	66,872,798.82
Grocery	76,376,769.52	63,676,754.16	12,700,015.30	152,753,538.98
Meat	32,338,893.35	26,554,678.06	5,784,215.34	64,677,786.76
Sum	147,523,835.47	121,218,228.28	26,305,607.20	295,047,670.95
Average	36,880,958.87	30,304,557.07	6,576,401.80	73,761,917.74

A typical visual total calculation would be the sum of all values in a row or column, although you can apply other summary calculations as well:

Name	Description
Sum	Sums a range of cell values.
Average	Averages a range of cell values.
Count	Counts the number of non-null cells in a range.
Min	Returns the minimum value in a range of cell values.
Max	Returns the maximum value in a range of cell values.
Median	Returns the median value for a range of cell values. The median is the middle value in a set.
Variance	Returns the variance for a range of cell values. Variance is the average squared deviation of each number from its mean.
Standard Deviation	Returns the standard deviation for a range of cell values using the biased population formula. Standard deviation is the square root of the variance.

Name	Description
Aggregate	The Aggregate total is available only for Microsoft Analysis Services data sources. The aggregate operation applies the aggregation operation specified on the server to the range of cell values.

These calculations are dynamic; the result set is always based on the members that have been selected in the query. For example, if you add a Sum calculation row, the calculation sums the values from all row members. If you then remove a row member, the calculation adjusts automatically for the removed member, summing only the values from visible row members.

For more information about the different visual total calculations, see “Custom calculations” in the *BusinessObjects Voyager User's Guide*.

Note:

- Visual totals ignore cells that are the result of other calculations.
- Visual totals do not take into account parent-child relationships when calculating cell values in a range. For example, if both a parent member and its child member are specified on an axis, and the visual total added is a Sum, the child member is added to the Sum twice: once as a single member and again as a contribution to the total of its parent member.

To add the default totals

For Microsoft data sources, the default totals are the aggregate type that is defined on the server. For other data sources, the default totals are sums.

-  On the toolbar, click the **Visual Totals** button.

  Alternatively, you can click the **Select All** button in the crosstab, right-click any data cell in the crosstab, and select **Show Visual Totals**.

The default totals are added to the crosstab, and an icon identifies the new row and column as visual totals. Also, the **Visual Totals** button is depressed, indicating that totals are applied to the crosstab.

To add commonly used visual totals (Aggregate, Sum, Average, and Count)

1. On the toolbar, click the arrow beside the **Visual Totals** button.
2. Point to either **Rows** or **Columns**, and then select a total type.

   Note:

   - For Microsoft data sources, the default total type is Aggregate. For other data sources, the default total type is Sum.
   - If you want to add more than one visual total to an axis, you can repeat these steps, or you can select **More** instead of **Rows** or **Columns**.

   An icon identifies the added rows and columns as visual totals. Also, the **Visual Totals** button is depressed, indicating that totals are applied to the crosstab.

To add other visual totals

1. On the toolbar, click the arrow beside the **Visual Totals** button.
2. Click **More** and select any totals you want to display on the crosstab.
3. Click **OK** to turn on the totals.

   An icon identifies the added rows and columns as visual totals. Also, the **Visual Totals** button is depressed, indicating that totals are applied to the crosstab.

Changing to a different visual total

Once you've added a visual total to a crosstab, you can easily change it to a different type.

To change a visual total to a different type

1. Right-click a visual total in the crosstab.
2. If you want to change the visual total to one of the commonly used types (Aggregate, Sum, Average, and Count), select it from the list.

   Or, if you want to apply one of the other available totals, select **More**.

    Alternatively, you can click the **Visual Total** icon to open the Visual Totals dialog box.

Removing visual totals

You can either turn off all totals simultaneously or remove individual totals.

To turn off all visual totals simultaneously

-  Click the **Visual Totals** button to turn off the totals.

  Alternatively, you can click the **Select All** button in the crosstab, right-click any data cell in the crosstab, and clear the check mark beside **Show Visual Totals**.

  Note:
  Both the Visual Totals button and the Show Visual Totals menu item toggle on and off all visual totals. If you have chosen to display several totals, they are all turned on and off simultaneously with the Visual Totals button or Show Visual Totals menu item.

To remove individual visual totals

-  Click the arrow beside the **Visual Totals** button, click **More**, and then clear any totals you want to remove from the crosstab.

  Alternatively, you can right-click a visual total and select **Remove Total**.

Visual totals on charts

When visual totals are enabled on a crosstab, any chart components linked to the same query also display the visual totals, if the Show Visual Totals property is set to `Yes` for those charts. By default, visual totals are not shown on charts.

Basic calculations

Basic calculations are simple arithmetic calculations involving two members; for example, the sum of two column members. Basic calculations do not take any additional parameters. If you want to create more complex calculations, see “Custom calculations” in the *BusinessObjects Voyager User's Guide*.

 The basic calculations are available from the drop-down list on the Calculation button.

Calculation	Description
Add	Adds the values in the selected rows or columns.
Subtract	Subtracts the values in the selected rows or columns. The cell values from the second selected row or column are subtracted from the values in the first selected row or column.
Multiply	Multiplies the values in the selected rows or columns.
Divide	Divides the values in the selected rows or columns. The cell values from the first selected member row or column are divided by the values in the second selected row or column.

Calculation	Description
Percentage	Divides the values in the selected rows or columns, and expresses the resulting values as percentages. The cell values from the first selected member row or column are divided by the values in the second selected row or column, and multiplied by 100.

Adding a basic calculation

When you add a basic calculation to the crosstab, it is added immediately to the right of the right-most selected member (for column-based calculations) or immediately below the bottom-most selected member (for row-based calculations).

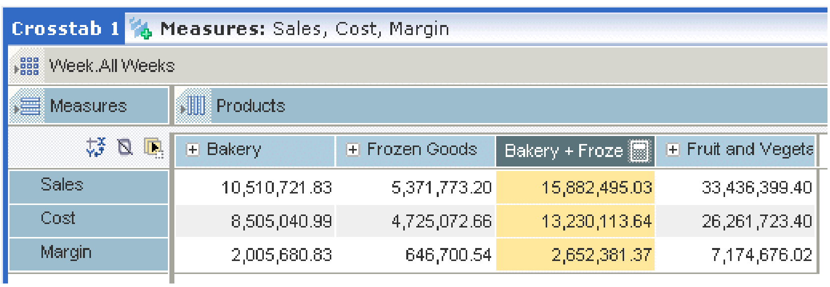
To add a basic calculation to the crosstab

1. Select two members in the crosstab.

   For subtraction, division, and percentage calculations, the calculation is defined in the order in which you select the members. That is, if you click the Food member first, and then the Drink member, a subtraction calculation would result in Food - Drink.

2.  On the application toolbar, click the arrow beside the **Calculation** button and select the type of basic calculation you want to create.

   The calculation is added to the crosstab as a calculated member.



To edit a calculation

1. Right-click the calculation member header.
2. Point to **Calculation** and then click **Edit**.

   Alternatively, you can click the icon in the calculation's member header.
3. In the Calculation Editor dialog box, change the calculation type or definition, and then click **OK**.

   The calculation in the crosstab updates to reflect any changes you made.

To delete a calculation

1. Right-click the calculation member header.
2. Point to **Calculation** and then click **Remove**.

   Alternatively, you can right-click the icon in the calculation's member header and select Remove Calculation.

Exporting data from Voyager

Exporting data from Voyager to Excel

You can export data from Voyager queries to Microsoft Excel, to allow Excel users to share your data. The data can either be viewed immediately in Excel, or saved to an .xls file that can be opened with Excel or third-party applications. To view your data immediately in Excel, you must have Excel already installed on your machine.

Data is exported in the orientation displayed in the crosstab. If the query has only a chart component associated with it, data from that query is exported but the chart visualization is not. Rows in the exported file correspond to rows in the crosstab, or data series in the chart. Columns in the exported file correspond to columns in the crosstab, or categories in the chart.

Sorts, filters, and ranks are preserved in the exported data. Calculated data is exported, but the calculation formulas are not preserved.

To export data from Voyager to Excel

1. Go to the page that contains the component whose data you want to export, and select the component.
2.  On the application toolbar, click **Export**.
3. In the dialog box, specify whether you want to view the file or save the file to disk, and then click **OK**.

   If you choose to save the file to disk, specify the name and location of the file that you want to export your data to.

   If you choose to view the file, it opens immediately in Excel.

   Note:
   The Export button is disabled until the current page contains a valid query.

Exporting data from Voyager to comma-separated-values (.csv) files

You can export data from Voyager queries to comma-separated-value format, to allow users of other applications to share your data. The comma-separated values can either be viewed immediately in an application such as Excel, or saved to a .csv file.

Data is exported in the orientation displayed in the crosstab. If the query has only a chart component associated with it, data from that query is exported but the chart visualization is not. Rows in the exported file correspond to rows in the crosstab, or data series in the chart. Columns in the exported file correspond to columns in the crosstab, or categories in the chart.

Sorts, filters, and ranks are preserved in the exported data. Calculated data is exported, but the calculation formulas are not preserved.

To export data from Voyager to a .csv file

1. Go to the page that contains the component whose data you want to export, and select the component.
2.  On the application toolbar, click the arrow beside the **Export** button, and select **CSV**.
3. In the dialog box, specify whether you want to view the file or save the file to disk, and then click **OK**.

   If you choose to save the file to disk, specify the name and location of the file that you want to export your data to.

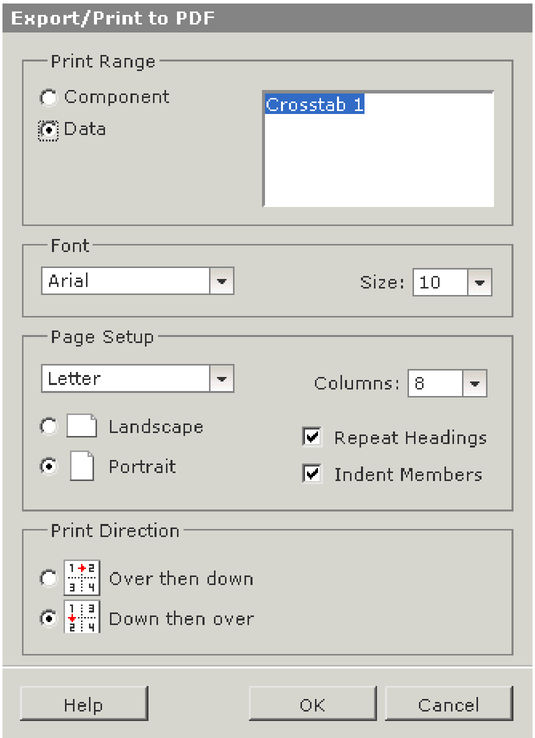
   If you choose to view the file, it opens immediately in your .csv file viewer, which is Microsoft Excel by default.

   Note:
   The Export button is disabled until the current page contains a valid query.

Printing Voyager workspaces

Although Voyager is primarily an analysis tool, you may want to print your workspace pages for sharing your analyses with colleagues. Using the printing capability in Voyager, you can do the following:

- *Print raw data* on page 199
- *Print a crosstab as it appears on the screen* on page 198
- *Print a chart as it appears on the screen* on page 199



Voyager creates a PDF representing the data or components that you want to print, and opens it in a new browser window using your default PDF viewer. You can then print hard copies of the data from the PDF viewer.

Note:
A component must have dimensions on both of its view axes before it appears in the list of components in the Print dialog box.

Name and Comments from the Properties tab

When you choose Component printing to print charts and crosstabs, the names of the components are printed in the page headers. If you have added comments to any components, the comments are printed in the page footers. For more information about names and comments, see "Properties tab" in the *BusinessObjects Voyager User's Guide*.

Formatted values or actual values

From the Properties tab in the tab panel, you can control whether formatted values or actual values are displayed in the crosstab. When you print a crosstab, the formatting of the cell values in the print output matches the on-screen display.

Print a crosstab as it appears on the screen

When you print a crosstab component, it is printed as it appears on screen, with minor exceptions. The crosstab is sized to fill the available space on the page, while preserving its aspect ratio.

The crosstab's name, as defined on the Properties tab, is printed above the crosstab. If comments are defined on the Properties tab, they are printed below the crosstab.

Crosstab formatting included in print output

The following crosstab formatting is preserved in the print output:

- Exception highlighting colors.
- Cell formatting; both the number formatting and the style (such as negative numbers shown in red).
- Dimension and level coloring.
- Any column or row resizing.
- Member indenting.
- Member aliases.

Member drill indicators (plus and minus signs) are not shown in the print output.

Member headings that don't fit within the column widths may be truncated differently from how they are truncated on screen.

Column and row sizes in print output

You may have resized some of the columns or rows in the crosstab. When you print the crosstab, all rows and columns are scaled by the same amount, so any resizing that you have applied is preserved, relative to the sizes of other rows and columns.

Print a chart as it appears on the screen

When you print a chart component, it is printed as it appears on screen, with minor exceptions. The chart is sized to fill the available space on the page, while preserving its aspect ratio.

The chart's name, as defined on the Properties tab, is printed above the chart. If comments are defined on the Properties tab, they are printed below the chart.

To print a chart to a PDF

1.  Click **Print** on the application toolbar.
2. Select **Component**.
3. Select the component that you want to print from the list in the Print Range area.
4. Choose your print options.

   For descriptions of the available print options, see "Print options".
5. Click **OK**.

   Your data is converted to a PDF and opened in a new browser window using your default PDF viewer. You can then print hard copies of the data from the PDF viewer.

Related Topics

• *Print raw data* on page 199
• *Print a crosstab as it appears on the screen* on page 198

Print raw data

You can choose to print raw data instead of the crosstab or chart representations of your data. If you have a crosstab associated with your query, the crosstab formatting is not applied. Data is formatted to fit the page size and page orientation print options that you select. For more information about print options, see “Print Options” in the *BusinessObjects Voyager User's Guide*.

Note:
When printing raw data, if a cell contains a number and that number does not fit completely inside the cell, the rightmost digits of the number are replaced with the number sign ("#") to indicate that the number has been truncated for printing.

To print raw data to a PDF

1.  Click **Print** on the application toolbar.
2. Select **Data**.
3. Select the component that you want to print data from in the list in the Print Range area.
4. Choose your print options.

   For descriptions of the available print options, see "Print Options" in the *BusinessObjects Voyager User's Guide*.
5. Click **OK**.

   Your data is converted to a PDF and opened in a new browser window using your default PDF viewer. You can then print hard copies of the data from the PDF viewer.

Related Topics
- *Print a crosstab as it appears on the screen* on page 198
- *Print a chart as it appears on the screen* on page 199

Working with Desktop Intelligence documents

chapter 11

Overview

When you work with Desktop Intelligence documents, you can use all of the InfoView features that are described in *Working with Objects* on page 51.

This section explains how to work with Desktop Intelligence documents in InfoView. Desktop Intelligence is a Business Objects product which allows you to create documents which gather data from databases. These documents can be uploaded to BusinessObjects Enterprise and shared with other users via InfoView. For information about how to create and edit documents in Desktop Intelligence, see the *Desktop Intelligence: Data Access and Analysis* Guide and the *Desktop Intelligence: Reporting Techniques and Formatting* Guide.

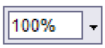
Note:
The information in this section is applicable only if you are viewing Desktop Intelligence documents in Web format. For more information, see *Desktop Intelligence preferences* on page 40.

Viewing Desktop Intelligence documents

You can double-click the title of a Desktop Intelligence document to view it in the Desktop Intelligence viewer in InfoView. You can navigate through, export, save, search, and zoom Desktop Intelligence documents with the viewer, as well as respond to prompts that were set up by the designer of the document. You can also choose to edit the document in the client version of Desktop Intelligence if it is installed on your computer.

Desktop Intelligence viewer toolbar

Option	Description
 **Document**	The **Document** menu enables you to close the document and return to the Document List, **Edit** the document in Desktop Intelligence, **Save** your changes to the document in InfoView over the existing document, or choose **Save as** to create a copy of the document in InfoView. You can also choose **Save to my computer as** to save a version to your local computer in comma separated value, Microsoft Excel, or PDF format.
View	The **View** menu lets you choose the way the Desktop Intelligence viewer displays the document. **Page Mode** displays the document in a paginated view. **Draft Mode** displays the document in a non-paginated view. **PDF** displays a PDF of the document. Your BusinessObjects Enterprise administrator determines whether the PDF is created of the entire document, or of the tab you are currently viewing.
	**Save Document** Saves the document to BusinessObjects Enterprise.
	**Export to PDF for Printing** Creates a PDF of the document so that you can print it.

Option	Description
	**Find text in tables and cells on this page** Allows you to search for text within the page of the document that you are viewing.
	**Undo previous action** Undoes your most recent actions.
	**Redo previous action** Redoes your most recent actions.
	**Zoom** Allows you to zoom in or out on a report.
	**Page navigation** Allows you to navigate between pages of the report.
Edit	Allows you to edit the document in Desktop Intelligence.
 **Refresh Data**	Gets the most recent data from the data source.

Navigating documents

You can navigate through the document by opening the "Navigation Map" and clicking on the report or section you wish to view.

To navigate through a Desktop Intelligence document

1. Open a Desktop Intelligence document in InfoView.
2.  Click on the **Navigation Map** icon to display the " Navigation Map".

   Note:
   The "Navigation Map" is displayed by default when you open a Desktop Intelligence document.

3. Expand the document you are viewing by clicking **+** .
4. Click on the report you would like to view.

   The report appears in the right panel of the viewer.

Entering User Prompt values

Prompts in Desktop Intelligence documents allow you to enter values which change the content or display of the document. The prompts and how they affect the Desktop Intelligence document are set by the designer of the document when it is created. You can edit the values from the "User Prompt Input" panel.

To edit and view user prompts

1. Open a Desktop Intelligence document in InfoView.
2.  Click on the **User Prompt Input** icon to display the "User Prompt Input" dialog box.
3. Select a prompt you want to edit and click **Advanced**.
4. In the "Prompts" dialog box, edit the prompt.

   Click **Refresh Values** to view the available values for the prompt. Select the value you wish to use and click **>**, or enter a different value.

5. Click **Run** to apply your new prompt values to the report.

Finding text

You can find text within Desktop Intelligence documents using the "Find" panel.

To find text in a Desktop Intelligence document

1. Open the document that you want to locate text in.
2.  Click **Find**.

   The "Find" options appear in the left panel.
3. In the **Find** field, enter the text you want to locate.
4. Select **Match whole word** and/or **Match case**.
5. Select the direction of the search: **Up** or **Down**.
6. Click **Find Next**.

Refreshing data

If you have the necessary rights in InfoView, you can refresh a Desktop Intelligence document to get the most recent data from the data sources.

Note:
Refreshing a document puts increased load on the BusinessObjects Enterprise server. Refresh a document when you think the data will be different from the data currently in the document. The last refresh date and time of the document you are viewing is displayed in the bottom-right corner of the Desktop Intelligence viewer.

To refresh data

1. Open a Desktop Intelligence document in InfoView.
2. Click **Refresh Data** in the Desktop Intelligence viewer toolbar.

   The report is updated with the most recent data and the "Refresh Date" of the report in the bottom-right corner of the viewer, is also updated.

Saving Desktop Intelligence documents

If you have the necessary rights in InfoView, you can save changes you have made to a Desktop Intelligence document, whether you have refreshed the data in a document or edited prompt values. Saving your changes overwrites the version of the document you opened with the version of the document you are currently viewing.

You can also save changes you have made to a Desktop Intelligence document as a new Desktop Intelligence document. Instead of replacing the original document with your changes, you save a new document that reflects the changes you have made, so that you can view and access both documents. You must use the **Save As** command to save your changes as a new document.

You can also save Desktop Intelligence documents to your local computer in PDF, comma separated value, or Excel format.

To save Desktop Intelligence documents

- In the Desktop Intelligence viewer toolbar, click **Document** and select **Save**.

  Your changes to the Desktop Intelligence document are saved to InfoView and can be viewed by anyone with rights to view the document.

To save changes as a new Desktop Intelligence document

1. In the Desktop Intelligence viewer toolbar, click **Document** and select **Save As**.
2. Choose the folder, categories, name, description and keywords you would like your new document to have.
3. To maintain the current regional format of time, dates, and numbers, select **Permanent regional formatting**.
4. To refresh the data in the report every time it opens for users who have the necessary rights, select **Refresh on open**.

To save Desktop Intelligence documents to your local computer

1. In the Desktop Intelligence viewer toolbar, click **Document**, select **Save to my computer as**, and choose your preferred format.

   Excel attempts to preserve as much formatting as possible in a Microsoft Excel file.

   PDF saves a PDF version of the report to your computer.

   CSV saves the data with commas separating each value, to enable easy data access and manipulation.

2. Click **Save** in the **File Download** dialog box and save your file to your local computer.

Printing Desktop Intelligence documents

You can print a Desktop Intelligence document while it is open and as you view it.

To print Desktop Intelligence documents

1. Open a Desktop Intelligence document in InfoView.
2.  In the Desktop Intelligence viewer toolbar, click **Export to PDF for printing**.
3. Download and open the PDF document.

   A PDF version of your document appears.

4. Print the PDF document from your PDF viewer.

Editing Desktop Intelligence documents

If you have the necessary rights in InfoView and have Desktop Intelligence installed on your local computer, you can open a Desktop Intelligence document directly from the Desktop Intelligence viewer.

Note:
You must have Desktop Intelligence installed on your local machine to edit Desktop Intelligence documents.

To edit Desktop Intelligence documents

- In the Desktop Intelligence viewer toolbar, click **Edit**.

  Desktop Intelligence opens on your local machine with the document you are viewing ready for editing. For more information, see the *Desktop Intelligence Access and Analysis Guide*.

Working with Dashboard and Analytics

chapter

12

Overview

You can use Dashboard Builder, a Dashboard and Analytics application, to create and edit dashboards and analytics.

To find out if you have access to Dashboard Builder, click **Open**. If the "Dashboard and Analytics" option does not appear, contact your BusinessObjects Enterprise administrator.

Dashboards can display objects such as Crystal reports, Web Intelligence documents, hyperlinks, or analytics in a single view so you can analyze data from one location. Analytics aggregate data on a business metric and display it visually. For example, the data can be displayed like a car's speedometer, a set of traffic lights, in charts, and graphs. Analytics can also display alerts if monitored values reach certain markers.

Example:

An analytic that monitors net sales for Europe can display use a traffic light visual, where a green light indicates that gross net sales are at an acceptable level. If the gross net sales drop below a preset value, the traffic light turns orange and then red. When salespeople add a Web Intelligence report on sales, a web page that reviews the company, and the analytic to a dashboard, they can compare the data side-by-side.

You can configure an alert analytic to display rule alerts in Performance Manager. A rule alert can contain suggested actions and link to applicable documents. These rule alerts help guide your company to return metrics to an acceptable value.

Tip:
If you have the necessary rights in InfoView, you can create and view personal and corporate dashboards. A personal dashboard, called My Dashboard, is for your use only and is saved in your personal folders. Corporate dashboards are available to other InfoView users and can contain analytics and objects tailored to people working in specific departments, regions, or roles, so that they see the same information.

Before you begin working with dashboards and analytics, set your dashboards and analytics preferences. For more information, see *Dashboard and analytics preferences* on page 47.

You can set either a personal or a corporate dashboard as your InfoView start page. For more information, refer to *General preferences* on page 30. For more information about working with Dashboards, see the *Dashboard Builder User Guide*.

To access Dashboard Builder

- In InfoView, you can access Dashboard Builder in three ways:
  - Click **Open** and select **Dashboard and Analytics**.
  - Navigate to a Corporate Dashboard in the **Document List** and double-click its title to open it.
  - Click **Dashboards** and select **My Dashboard**.

Working with Publishing

chapter 13

Overview

This section introduces you to the Publishing feature and publications. This section is focused on consuming publications, rather than creating them. If you will be working extensively with publications, you should refer to the *BusinessObjects Enterprise Publisher's Guide*.

About Publishing

"Publishing" is the process of making documents such as Crystal reports, Web Intelligence documents, and Desktop Intelligence documents publicly available for mass consumption. The contents of these documents can be distributed automatically via email or FTP, saved to disk, or managed through the BusinessObjects Enterprise platform for web viewing, archiving, and retrieval, and automated through the use of scheduling. From within InfoView or the CMC, you can take documents and tailor them for different users or recipients; schedule a publication to run at specified intervals; and send it to a number of destinations, including recipients' Business Objects inboxes and email addresses.

Note:
"Publishing" is distinct from the Publishing Wizard. The Publishing Wizard is a Windows-based product that is designed to add documents to the Central Management Server (CMS). For information about the Publishing Wizard, see the *BusinessObjects Enterprise Administrator's Guide*.

What is a publication?

A "publication" is a collection of documents intended for distribution to a mass audience. Before the documents are distributed, the publisher defines the publication using a collection of metadata. This metadata includes the publication source, its recipients, and the personalization applied.

Publications can help you send information through your organization more efficiently:

- They allow you to easily distribute information to individuals or groups of users and personalize the information each user or group receives.

- They provide delivery of targeted business information to groups or individuals through a password-protected portal, across an intranet, an extranet, or the Internet.
- They minimize database access by eliminating the need for users to send process requests themselves.

You can create different types of publications based on Crystal reports, Desktop Intelligence documents, or Web Intelligence documents.

Publishing concepts

Delivery rules

Note:
This feature is unavailable for Web Intelligence documents.

"Delivery rules" affect how documents in publications are processed and distributed. When you set delivery rules on documents, you indicate that the publication will be delivered to recipients only if the content in the documents meets certain conditions. There are two types of delivery rules:

- Recipient delivery rule

  If the data in the recipient's instance meets the delivery rule, the instance is delivered to the recipient.
- Global delivery rule

  If the data in a designated document meets the delivery rule, the publication is delivered to all recipients.

  Note:
  The designated document for a global delivery rule can be different from the document or documents used in a publication. For example, you can set a global delivery rule on a Desktop Intelligence document used as a dynamic recipient source instead of a Desktop Intelligence document in the publication.

If a publication has recipient and global delivery rules, the global delivery rule is evaluated first to determine whether the publication will be processed. If the publication meets the global delivery rule, the system then evaluates the recipient delivery rules to determine which instances to process and distribute for each recipient.

How you set delivery rules depends on the document type that you want to publish. For Crystal reports, you specify a delivery rule based on a named alert that the report designer creates in the Crystal report. For Desktop Intelligence documents, you specify a formula expression. You can also set a delivery rule based on whether the personalized publication contains any data.

The diagram “Global delivery rule met” illustrates how an alert-based global delivery rule works. Here the global delivery rule is set on a document in the publication. The Crystal report has a Revenue alert for values greater than 100,000. The publisher creates a global delivery rule based on the Revenue alert so that the Crystal report is only delivered to all recipients if revenue exceeds 100,000. In this case the delivery rule is met, so the Crystal report is delivered.

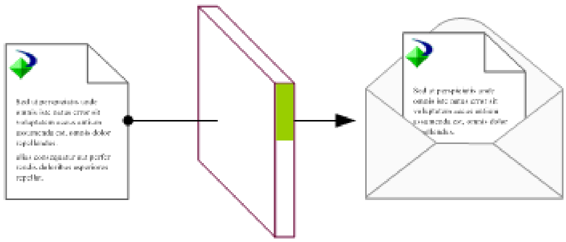


Figure 13-1: Global delivery rule met

The diagram “Recipient delivery rule unmet” illustrates how a recipient delivery rule works. The publisher sets a recipient delivery rule for the Crystal report so that the report is delivered to recipients only if the report contains data for that recipient. When the report is personalized for each recipient, Green Recipient does not have data in the Crystal report. This means that only Blue Recipient and Orange Recipient receive the publication.

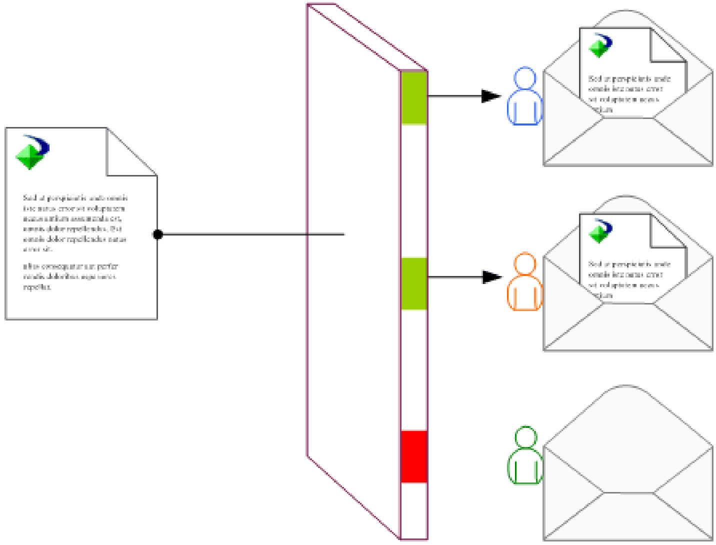


Figure 13-2: Recipient delivery rule unmet

For publications that contain multiple documents and objects, each document can have its own recipient delivery rule. When you do this, you have the following options for processing and delivery:

- If a document in the publication fails to meet its recipient delivery rule for a recipient, the entire publication will not be delivered for that recipient.
- If a document in the publication fails to meet its recipient delivery rule for a recipient, that document will not be delivered, but all other documents in the publication will be delivered for that recipient.

Delivery rules are useful because they allow publications intended for a large number of recipients to be processed and distributed more efficiently. Consider a situation in which a publisher at an insurance company creates a publication for its clients that contains the following objects:

- An insurance bill (personalized Crystal report).
- A monthly statement (personalized Crystal report).
- A payment methods brochure (PDF).

In the insurance bill, there is an Amount Due alert for values greater than zero. The publisher creates an Amount Due recipient delivery rule for the insurance bill so that the insurance bill is published and distributed only if a client owes the insurance company a payment. The publisher also specifies that the entire publication will not publish if the insurance bill fails to meet the delivery rule because he does not want clients to receive a monthly statement and a brochure when they do not have to pay a bill. When the publication is run, the publication is processed and distributed to clients who owe payments only.

Note:
If a Crystal reports publication is scheduled to print when the publication runs, the print job occurs regardless of whether a document in a publication fails to meet a delivery rule and is not delivered to a recipient. This is because print jobs are processed during personalization, and delivery rules are applied to publications after personalization.

Formats

Formats define the file types that a publication's documents will be published in. A single document can be published in multiple formats, and these instances can be delivered to multiple destinations. For publications with multiple documents, you can specify a different format for each. For publications that contain Desktop Intelligence or Web Intelligence documents, you can publish the whole document or a report tab within the document to different formats.

Any formats you choose for a document apply to all recipients of the publication. For example, you cannot publish a document as a Microsoft Excel file for one recipient and as a PDF for another. If you want the recipients to receive instances in those formats, each recipient will receive a Microsoft Excel file and a PDF.

Possible formats

Document type	Format	Description
All document types	mHTML	This option publishes the document in mHTML format. You can also embed a document's content as mHTML in an email: • For Crystal reports, you can embed the content of one report in an email. • For Desktop Intelligence documents, you can embed the content of one report tab or all report tabs from a single document in an email. • For Web Intelligence documents, you can embed the content of one report tab in an email.
	PDF (.pdf)	This option publishes a document as a static PDF.
	Microsoft Excel file (.xls)	This option publishes a document as a Microsoft Excel file and preserves as much of the original format of the document as possible.

Document type	Format	Description
Crystal reports	Data only Microsoft Excel file (.xls)	This option publishes a Crystal report as a Microsoft Excel file that contains data only.
	XML	This option publishes a Crystal report in XML format.
	Crystal report (.rpt)	This option publishes a Crystal report in its original format.
	Microsoft Word file (.doc)	This option publishes a Crystal report as a Microsoft Word file and preserves the original formatting of the Crystal report. This option is recommended if you expect recipients to view the publication without making many changes to it.
	Editable Microsoft Word file (.rtf)	This option publishes a Crystal report as a Microsoft Word file that you can edit more easily. This option is recommended if you expect recipients to view the publication and edit its content.
	Rich text (.rtf)	This option publishes a Crystal report in rich text format.
	Plain text (.txt)	This option publishes a Crystal report in plain text format.
	Paginated text (.txt)	This option publishes a Crystal report in plain text format and paginates the content of the publication.
	Tab-separated text (.txt)	This option publishes a Crystal report in plain text format and separates the content in each column using tabs.
	Character-separated values (.csv)	This option publishes a Crystal report as a character-separated values file.

Document type	Format	Description
Desktop Intelligence documents	Desktop Intelligence document (.rep)	This option publishes a Desktop Intelligence document in its original format.
	Rich text (.rtf)	This option publishes a Desktop Intelligence document in rich text format.
	Plain text (.txt)	This option publishes a Desktop Intelligence document in plain text format.
Web Intelligence documents	Web Intelligence document (.wid)	This option publishes a Web Intelligence document in its original format.

Destinations

Destinations are locations that you deliver publications to. A destination can be the BusinessObjects Enterprise location in which a publication in stored, an Business Objects inbox, a email address, an FTP server, or a directory on the file system. You can specify multiple destinations for a publication.

If you are publishing multiple Crystal reports, you can also merge them into a single PDF on a per destination basis.

If you want to publish a publication as a single ZIP file, you can choose to zip or unzip the instances on a per destination basis (for example, zip the instances for email recipients and leave them unzipped for Business Objects inboxes).

Related Topics

- *Possible destinations* on page 224

Possible destinations

Destination	Description
Default Enterprise location	The publication is accessible from the folder in which it was created. For the default destination, you have these options: • Merge all PDF documents (Crystal reports only). • Package the publication as a ZIP file. **Note:** If you distribute a publication to the default location or a shortcut to a recipient's Business Objects inbox, you must select a folder that is accessible to all recipients as the publication’s location.
Business Objects inbox	The publication is sent to the recipient's Business Objects inbox. For the Business Objects inbox destination, you have these choices: • Deliver objects to each user. • Have the target name automatically generated, to enter a specific name for it, or to choose from a list of placeholders. • Have the publication sent as a shortcut or as a copy. • Merge all PDF documents (Crystal reports only). • Package the publication as a ZIP file.
Email	

<table>
<tr><th>Destination</th><th>Description</th></tr>
<tr><td></td><td>
The publication is sent to recipients via email. For email recipients, it is recommended that you complete the From field. If you do not complete the From field, BusinessObjects Enterprise uses the email address associated with the publisher's account. If the publisher's account has no email address, BusinessObjects Enterprise uses the Destination Job Server's settings.
Note:
If there is no From value provided by the From field, the publisher's account, or the Destination Job Server, the publication will fail.
You also have these choices:

Deliver objects to each user.
Complete the To field or enter a placeholder for the email address.
Complete the Cc field.
Enter the subject or select a placeholder to use for this field.
Enter text in the Message field to be delivered with your publication. You can also choose from a list of placeholders to use in the Message field and embed dynamic content document content in the body of the email.
Attach source document instances to the email.
Have the attachment name automatically generated, to enter a specific name for it, or to choose from a list of placeholders.
Merge all PDF documents (Crystal reports only).
Package the publication as a ZIP file.

Note:

Before you use this destination, ensure that your email settings are configured properly on the Destination Job Server.
If you are sending publications to recipients via email, ensure the placeholder %SI_EMAIL_ADDRESS% is in the To field and Deliver objects to each user is selected.

</td></tr>
<tr><td>FTP server</td><td></td></tr>
</table>

Destination	Description
	For FTP server, complete the **Host** field. If you do not complete the **Host** field, the option configured for the Destination Job Server will be used. You also have these choices: • Specify a port number, a user name and password, and an account. • Enter a directory name. • Have the file name automatically generated, to enter a specific name for it, or to choose from a list of placeholders. If **Specific name** is selected, you can also choose to add a file extension. • Merge all PDF documents (Crystal reports only). • Package the publication as a ZIP file.
Local disk	If you choose local disk as the destination, you must enter the directory for your publication. You also have these choices: • Deliver objects to each user. • Have the file name automatically generated, to enter a specific name for it, or to choose from a list of placeholders. If you select a specific name, you can also choose to add a file extension. • Enter a user name and password to access the file location. • Merge all PDF documents (Crystal reports only). • Package the publication as a ZIP file.

Note:

- **Deliver objects to each user** is selected by default for all destinations. However, in some cases, you may not want to deliver objects to each user. For example, three recipients have identical personalization values and thus receive the same data in their publication instances. If you clear **Deliver objects to each user**, one publication instance is generated and delivered to all three recipients. If you select **Deliver objects to each user**, the same publication instance is delivered three times (once for each recipient). Additionally, if you are sending the publication to an FTP server or local disk destination and some recipients share identical personalization values, you can clear **Deliver objects to each user** to decrease overall processing time.
- If you clear **Deliver objects to each user**, any placeholders that you use when you configure your destinations will contain the publisher's information and not the recipient's.

Subscription

A "subscription" allows users who were not specified as recipients of a publication to receive publication instances when the publication runs. Users can subscribe to a publication if they want to view the latest instance, or they can unsubscribe from a publication they no longer want to receive. If a user has the appropriate rights, the user can also subscribe and unsubscribe other users.

To subscribe to and unsubscribe from a publication, a user must have the following:

- Appropriate rights, including:
  - View right on the publication.
  - Subscribe to publications right on user accounts for Enterprise recipients.
- Access to InfoView or the CMC.
- A BusinessObjects Enterprise account.

Note:
Dynamic recipients cannot subscribe and unsubscribe themselves automatically.

To create a new publication in InfoView

This task lets you access the Publishing feature in InfoView and begin creating a publication.

1. Click **Document List**.
2. In the Tree panel, browse for the folder in which you want to create the publication.
3. Select the folder so that its contents are displayed in the Details panel.
4. Click **New** > **Publication**.

   The **New Publication** page appears.

On the **New Publication** page, you can specify all the information required for your publication, including source documents, recipients, delivery formats and destinations, and how those documents are personalized.

More Information

A

appendix

<table>
<tr><th>Information Resource</th><th>Location</th></tr>
<tr><td>SAP BusinessObjects product information</td><td>http://www.sap.com</td></tr>
<tr><td>SAP Help Portal</td><td>Select http://help.sap.com > SAP BusinessObjects.

You can access the most up-to-date documentation covering all SAP BusinessObjects products and their deployment at the SAP Help Portal. You can download PDF versions or installable HTML libraries.

Certain guides are stored on the SAP Service Marketplace and are not available from the SAP Help Portal. These guides are listed on the Help Portal accompanied by a link to the SAP Service Marketplace. Customers with a maintenance agreement have an authorized user ID to access this site. To obtain an ID, contact your customer support representative.</td></tr>
<tr><td>SAP Service Marketplace</td><td>http://service.sap.com/bosap-support > Documentation
• Installation guides: https://service.sap.com/bosap-instguides
• Release notes: http://service.sap.com/releasenotes

The SAP Service Marketplace stores certain installation guides, upgrade and migration guides, deployment guides, release notes and Supported Platforms documents. Customers with a maintenance agreement have an authorized user ID to access this site. Contact your customer support representative to obtain an ID. If you are redirected to the SAP Service Marketplace from the SAP Help Portal, use the menu in the navigation pane on the left to locate the category containing the documentation you want to access.</td></tr>
<tr><td>Developer resources</td><td>https://boc.sdn.sap.com/

https://www.sdn.sap.com/irj/sdn/businessobjects-sdklibrary</td></tr>
</table>

Information Resource	Location
SAP BusinessObjects articles on the SAP Community Network	*https://www.sdn.sap.com/irj/boc/businessobjects-articles* These articles were formerly known as technical papers.
Notes	*https://service.sap.com/notes* These notes were formerly known as Knowledge Base articles.
Forums on the SAP Community Network	*https://www.sdn.sap.com/irj/scn/forums*
Training	*http://www.sap.com/services/education* From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style.
Online customer support	*http://service.sap.com/bosap-support* The SAP Support Portal contains information about Customer Support programs and services. It also has links to a wide range of technical information and downloads. Customers with a maintenance agreement have an authorized user ID to access this site. To obtain an ID, contact your customer support representative.
Consulting	*http://www.sap.com/services/bysubject/businessobjectsconsulting* Consultants can accompany you from the initial analysis stage to the delivery of your deployment project. Expertise is available in topics such as relational and multidimensional databases, connectivity, database design tools, and customized embedding technology.

Index

D

E

F

T

U

V

W